



PO BOX 1177

NEWBURGH, IN 47629

P 812-490-9600

F 812-490-9102

[www.advantagetaxaccounting.com](http://www.advantagetaxaccounting.com)

TAX YEAR 2019

Hello Everyone! We hope you had another successful and enjoyable year.

As most of you know, constant changes in tax laws are happening and we are here to answer any questions you may have. If you feel the Secure Act affects your 2018 return, please let us know. Enclosed you will find the 'check off' list for your convenience on gathering all your information to prepare your 2019 tax return. It is also helpful if you review last year's return to see what documents you need to turn in...this helps us in delaying the preparation of your return.

**Additional things to consider as you gather information for your tax return:**

- ✓ **Please inform us of any address, phone, dependent or bank changes that have occurred since you filed last year. If you have a new dependent, we will need a copy of their social security card and birth certificate.**
- ✓ As stated, it is very important we are informed of any life changes to help us determine your filing status. This includes marriage, divorce, new dependent(s) and past dependent(s) no longer eligible to be claimed. If divorced, which dependent(s) do you claim? **If you are using direct deposit, starting this year we need a voided check or bank letter stating the routing and account number to be used.**
- ✓ Form 1098 is required from you if you pay mortgage interest on your personal residence(s). Additionally, we must obtain refinancing closing statements, and if you drew money out on a home mortgage or your refinanced, we must have general information on the use of the money according to the IRS. Please inform us if you sold your home to help us determine if you meet the capital gain rule.
- ✓ Investment information is very important. You should receive a 1099B from your investment company reporting these transactions to you by February 15. You may also receive a 1099INT or 1099DIV reporting interest and dividends. Some companies send this information with your year-end statement. **Please watch for this information – we need it. We are not responsible for information not reported to us.**
- ✓ If you made estimated payments for tax year 2019 please provide us with proof of payment(s). (amount & or dates)
- ✓ If you have a dependent(s) in college, if possible, please include an itemized statement from the college for the 2019 tax year along with the 1098T you may receive. Sometimes the 1098T does not reflect the accurate amount to use for current year expenses and payments. We also need to know what year your student is considered (freshman - senior).
- ✓ For those of you who itemize and have non-cash charitable donations, [www.goodwillpromo.org](http://www.goodwillpromo.org) is a good site to help you when valuing your donations. **You are responsible for stating the value of your donation.** ALL deductions of any amount must have a receipt. Any individual contribution over \$250 must also have an acknowledgement letter from the charity, and the letter must be dated by the date we file your return. The letter should show the date and amount of any individual contribution over \$250 and should also state that no goods or services were received in return for the contribution.

**Please read the enclosed Engagement Agreement, sign and bring to us along with your tax information.**

Payment is expected at the time of picking up the return. We accept cash, check and credit cards. **Credit card charges will incur a 3% additional charge.**

Present or mention this letter for \$10 off your fee and for each "new" referral that comes to us for tax preparation and mentions being referred by you, you will receive a \$25 credit.

**Our office hours are Monday-Thursday 8a-7p, Friday 8a-4p. You may drop off your tax information anytime during business hours (no appointment necessary).** If you require a sit-down appointment, an additional charge will apply. **We will be CLOSED on Good Friday!**

We are pleased to have you as a client and look forward to serving you again this year. God bless!