

DECEMBER 2018

YOUR TENTATIVE TAX APPOINTMENT IS BELOW, PLEASE CONFIRM.

DATE: _____ TIME: _____ A.M. P.M. PLACE: _____

CONFIRM your appointment as soon as possible by contacting us via phone or email. We want to accommodate all our clients as best as possible and your confirmations are very helpful to this process. (Satellite locations on reverse side)

Thank you for your continued confidence in our services. We'd like to take a moment to introduce our 2018 Tax Season Team. Our preparers this year include: Kari L. Pel, EA CFP®, Dr. Paul McReynolds, EA and Ashley Petrie, EA. Our support staff includes: Holly Sherman, Mary "Debbie" Steiner, Jessica Baeckel and Alice Pacey. We are dedicated to making this an enjoyable tax season for all.

Additional Fees:

Appointments After April 1- For all tax appointments scheduled on or after **April 1**, an additional fee of **\$25** will be added to the cost to prepare the return. If we receive information in April, we will likely recommend going on extension. The tax extension will allow us adequate time to thoroughly prepare your return.

Correspondence Returns- If you have not sent in any documents and the information is received **after March 15** there is a **\$25 fee added**, and if the initial information is received **after April 1** there is a **\$50 fee added** to the total cost of the return.

This does not include additional documents we request to complete the return.

Extension Deposit- We will require all clients to sign an Extension Agreement and pay a \$25 deposit that will go toward the cost of the tax return (this is not an additional fee)

- ❖ If you cannot make an appointment to meet in person, please consider a phone appointment instead! If you send in your documents to the office, we will have a phone call arranged with a preparer. (see below)
- ❖ Not sure if you should continue to itemize? Itemizing may still be an important benefit for you on your Federal or State Tax return. Please fill out the Organizer so we can best serve you and help you experience every deduction you are entitled to. Contact us with any questions related to your specific situation.



Mail: P.O. Box 400, Los Alamitos, CA 90720



Cloud Cabinet: Call to get signed up today!



Fax: 866-279-4916



admin@pelandassociates.com

For your security, we do not recommend sending any private information except through mail or Cloud Cabinet.

Organizer Tips If you would like to receive a more detailed organizer that lists last year's information alongside space to enter in this year's information, please call or e-mail the office. We will get one out to you right away.

- ❖ **Preparation:** Please come prepared and add up all tax receipts **IN ADVANCE**.
- ❖ **Check W-2's and 1099's:** Please check for accuracy **BEFORE** your appointment.
- ❖ **If you sold stock:** Make sure to bring your 1099-B Forms **AND** the cost basis information.
- ❖ **If you sold a home:** Please bring closing statements for the purchase and sale.
- ❖ **Please bring any forms 1095-A, 1095-B, 1095-C received.** These forms include important information we need relevant to the Affordable Health Care Act.
- ❖ **The IRS Standard Mileage rates for 2019:** As of printing, the 2019 rates have not yet been released. We will update our website and Facebook page when we have more information.
- ❖ **DMV Fees:** Remember, only the license fee, based on the value of the vehicle, is deductible on your tax return. For California vehicles, the deductible portion is listed on the bill as "License Fee" with the verbiage, "This may be a tax deduction" next to it. Please have this information available at your tax appointment. You can also check out the DMV website at www.dmv.ca.gov for more information.
- ❖ **Medicare Premiums:** In the medical section of the 2018 Tax Organizer, please indicate whether you have included your Medicare premiums as part of your insurance premiums. We want to make sure we are not duplicating this information as it is reported on your Social Security Statement (Form 1099-SSA).
- ❖ **State Estimated Payment:** If you had a large increase in income during 2018, it might be wise to make your state tax payment before December 31, 2018. The amount may be deductible on your federal return as an itemized deduction. (Sorry, the federal tax payments are not deductible on the state return). To verify that a pre-payment of State income tax would be of benefit to you, please call the office.
- ❖ **SPECIAL NOTE FOR MINISTERS: Establishing your 2019 Housing allowance.** Remember, your housing allowance should be established each year and in advance. This firm recommends that you establish your 2019 housing allowance in December. If you have any questions, or would like some guidance in this area, please give us a call.

Your confidence in us means everything. If you know of someone seeking tax or financial advice, please pass along our number. A good referral is the best compliment.

Tax Interview Dates and Cities ("Satellite" Locations): Satellite locations have **limited availability**. Please call soon to reserve your appointment or to be put on a waiting list for your desired date.

Alta Loma- March 12 (Tues)	Pilgrim Place Homes- (for Pilgrim Place Residents ONLY)	Riverside- Feb 7 (Thurs) Mar 9 (Sat)
Beaumont- Feb 23 (Sat)	Feb 28 (Thurs), March 7 (Thurs)	San Dimas- Feb 21 (Thurs)
Corona- Feb 9 (Sat), Feb 26 (Tues)	March 26 (Tues), March 28 (Thurs)	San Juan Capistrano- Feb 5 (Tues)
El Toro- Mar 5 (Tues)	Rancho Cucamonga- Feb 19 (Tues)	Tujunga- March 19 (Tues)
Hemet- Feb 12 (Tues)	March 21 (Thurs)	Victorville- March 14 (Thurs)
Moreno Valley Feb 2 (Sat)		

Merry Christmas and Happy New Year!

Kari L. Pel, EA, CFP® Dr. Paul McReynolds, EA Ashley Petrie, EA
Holly Sherman Mary 'Debbie' Steiner Alice Pacey Jessica Baekkel



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