

Summer 2018

We want to thank each of our clients for your continued reliance on our services. We have felt the blessing of your kind words and prayers as we worked through the season to meet the deadline. We continue to work diligently to maintain our quality of service.

2017 Extensions

If you filed an extension for your individual 2017 tax return, the **final deadline** to file is Monday October 15, 2018. Please contact our office soon to schedule an appointment for your tax preparation. You may also send in your documents for a phone appointment, via mail, fax or our web-based system called Cloud Cabinet. The Cloud Cabinet also stores your tax documents for up to 5 years. Contact the office to be set up with your personal username and password on the Cloud Cabinet, today!



Tax Reform

It's here, whether we are ready or not! The attached newsletter highlights the changes that will affect most people. If you have any questions regarding how Tax Reform will affect you, please call the office so we can discuss your particular situation.

Tax Season Team Members

We greatly appreciate our support staff for the 2017 tax season. We are so grateful that Alice has continued each year to provide support to the office staff. Many of you spoke with Mary "Debbie" throughout the season. She has blessed our office with her assistance and we trust she was helpful to you. We would like to give special thanks to Ashley Petrie, EA who assisted many of you with preparing your returns. We are so grateful she returned this season! And as always we are thankful for Dr. Paul McReynolds, EA for his years of expertise.

Franchise Tax Board Letter

You may have received a letter from California Franchise Tax Board (FTB) requesting to confirm your identity. The letters are sent out in an effort to protect the tax payer's identity. These letters are *legitimate* and you can respond by calling the Franchise Tax Board directly. In many cases, they can confirm your identity and tax return over the phone with no additional information needed. If you receive a letter and have questions, please call us here at the office. We are happy to assist you.

Additional Services

In addition to preparing tax returns each year, we also offer other services including payroll processing, bookkeeping, and tax planning. Please feel free to contact our office if you are interested in learning more about any of these.

May you have a relaxing summer! - Pel & Associates Team