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January 12, 2019: *Happy New Year*! Once again, it's time to prepare your tax returns. Enclosed is a pocket calendar that also works as an **auto travel log**, please use it. The changes you have heard in the news are for 2018 taxes, mostly.

Please gather your tax W-2 forms, 1099 interest, misc., 1098 mortgage interest, **Form 1095-A (Marketplace Insurance)** and any other tax forms you have received and review them for accuracy. If there is a mistake, promptly contact the business that issued it you and have them issue a corrected form. It's important they make the corrections ASAP (before 1/31).

If you have W-2 or 1099 forms to issue, then please contact me ASAP, as you must send these out to your contractors or employees by January 31st. Forms 1099-MISC are issued for services, $600+, paid to all attorneys and all others that are not corporations. Worksheets for this information can be found on the CRS website, under Accounting. You must collect the W-9 form info only once, unless there's a change. **Send a copy of the completed forms with the amount paid to each (spreadsheet ok), to my office by 1/20.**

S Corporation & partnership returns, are due by March 15th. I need your year-end figures soon, starting Feb 1st. Returns are prepared on a first-come, first-served basis. Those arriving late may have to go on extension, which ends September 15th. Filed S-Corp extensions save $195/month per partner, in late fees.

Personal returns, C corporations & trusts are due by April 15th. Please send me your information starting Feb 1st. Your personal returns will be E-Filed, when possible, with a printed or PDF copy to you. You can also **scan & email your information to me, in one PDF file**, but be sure to keep the originals in your file. If you bought or sold any real estate, please include a copy of the HUD-1 or Closing statement (2-3 pages-legal size), and other expenses paid.

Additional health insurance information may also be needed such as: # of months each family member was covered, type of policy, deductible amount, & premiums paid BY YOU.

Go to **http://crsmanagement.com/Tax Forms.htm** to find helpful tax forms. Ignore the date on the form, as it's only used as a worksheet. The enclosed Tax Organizer can be used as a checklist. Use this form only if there is not an original document, which I prefer to see.

Copies of old tax return files will be scanned then shredded, 5 years after they have been prepared (shredding 2012 & older, if filed on time). Most clients have replied with their choice of shred or return copies. If you now want your old copies, reply by 1/20.

Referrals are appreciated (and rewarded). We also provide payroll processing and sales tax filing services and filing VERY PAST DUE tax returns. Thanks for your continued loyalty.

Sincerely,
Richard Schroeder

Save time and money by providing the following (originals or scans-NOT photos, & email to CRSManagement@hotmail.com) and use the Tax Organizer (or look at last year's return) to add any additional information or to reference:

1. Wage statements/W-2s
2. Self-employment business income and expenses/1099-MISC
3. Commissions received/paid
4. Pension, retirement income/1099-R
5. Unemployment income/1099-G
6. Canceled Debt Amount/1099-C
7. Social Security income/SSA-1099
8. IRA contributions/year-end statements
9. Statements on the sales of stocks or bonds/1099-B
10. Interest and dividend income /1099-INT/1099-DIV
11. Lottery or gambling winnings/losses
12. State refund amount/1099-G
13. Income and expenses from rentals
14. Alimony paid or received
15. Record of purchase or sale of residence
16. Form 1095 & all medical & dental expenses (if over 10% of your gross income)
17. Real estate and personal property taxes
18. State or local taxes paid
19. Estimated taxes or foreign taxes paid (amounts and date paid)
20. Cash and non-cash charitable donations (receipts if over $250)
21. Mortgage or home equity loan interest paid/1098
22. Unreimbursed employment-related expenses
23. Job-related educational expenses
24. Educator expenses
25. Tuition and Education Fees/1098-T
26. Student loan interest/1098-E
27. Casualty or theft losses
28. Child care expenses and provider information
29. Forms 1095-A B and/or C Health Insurance Marketplace, etc. information

<u>If a new client to CRS, also bring (originals or copies):</u>

30. Social Security card(s) and date of birth(s) for all on tax return.
31. Driver's License(s)/state ID for all.
32. The last filed Federal and State tax return (and tax program files on flash drive)

CRS Management, Inc.
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DIRECT DEPOSIT INFORMATION:
Bank Name ______________________________
Savings / Checking (circle one)
Routing # (9 digits) ________________________
Account # ________________________________