





## Referrals Appreciated

### Tax Issues

Our clients frequently contact us for assistance in dealing with tax issues such as the following.

- Pension or IRA distributions.
- Significant change in income or deductions.
- Job change.
- Marriage.
- Start-up or sale of business.
- Purchase or sale of a home or other real estate.
- Retirement.
- Divorce or separation.
- Self-employment or contract work.
- Large charitable contributions.
- Children in college.

### Confidentiality

As professional tax preparers we are bound by rules of ethics to keep all of your information confidential. We take great care in handling your information, including names, addresses, birth dates, and Social Security Numbers, and items of income and deductions. We have safeguards in place to protect the security of your physical documents as well as security of electronic information used to process and file your returns with the IRS and state revenue agencies.

We adhere to strict rules regarding any disclosure or use of your personal information. We will not disclose or use any of your personal information obtained during the tax engagement for purposes other than preparation and filing of your returns unless we obtain specific written authorization from you in advance.

### Checklist of Common Errors When Preparing Your Tax Return

The IRS created the following checklist based on common filing errors.

- Did you choose the correct filing status?
- Did you enter the names and Social Security Numbers for everyone listed on your return exactly as those names and numbers appear on each person's Social Security card? If there have been any name changes, be sure to contact the Social Security Administration at [www.ssa.gov](http://www.ssa.gov) or call them at 800-772-1213.
- Did you enter your income on the correct lines?
- Did you calculate deductions and credits correctly, put them on the right lines and attached the necessary forms or schedules?
- Did you figure the tax correctly?
- Did you sign and date the return?
- If you filed a paper return, did you use the correct mailing address from your tax form instructions?
- If you are due a refund and requested direct deposit, did you double-check your routing and account numbers for your financial institution?
- Did you make a copy of the signed return and all schedules for your own records?

### Contact Us

There are many events that occur during the year that can affect your tax situation. Preparation of your tax return involves summarizing transactions and events that occurred during the prior year. In most situations, treatment is firmly established at the time the transaction occurs. However, negative tax effects can be avoided by proper planning. Please contact us in advance if you have questions about the tax effects of a transaction or event, including the following:

- Pension or IRA distributions.
- Significant change in income or deductions.
- Job change.
- Marriage.
- Attainment of age 59½ or 72.
- Sale or purchase of a business.
- Sale or purchase of a residence or other real estate.
- Retirement.
- Notice from IRS or other revenue department.
- Divorce or separation.
- Self-employment.
- Charitable contributions of property in excess of \$5,000.

This brochure contains general information for taxpayers and should not be relied upon as the only source of authority. Taxpayers should seek professional tax advice for more information.

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