BOB McCOMBS & COMPANY

CERTIFIED PUBLIC ACCOUNTANTS

Dear Client:

We are not automatically sending you a computer printed organizer because you have not used it in the past or you have not signed our “use” consent form. Please gather your information as you have in the past and either send it to us or have it ready for our appointment. If you would like a printed Client Organizer, it is available upon request.

We ask that you have available (or send us copies of) the following information:

- The **SIGNED** "Questions" sheet with the relevant boxes and boxes 1 & 2 checked. Note that it is 2 sheets this year (beige and blue).
- Copy of your (and spouse's) driver's license (req'd to combat ID theft).
- Copy B of all IRS forms you have received (Forms W-2, 1099, 1098, 5498).
- Final paycheck stub from all employers showing 2016 year-to-date information.
- Copy B of Form 1098-T's showing tuition. (This form is sent to the student). Also, the university tuition payment transcripts.
- Form 1095-A or 1095-B from your health insurance company or Form 1095-C.
- If any investments were sold, the "realized gain report" from your broker.
- K-1 forms showing income from partnerships, S corporations, estates/trusts.
- Closing statements (HUD-1) for real estate bought, sold, refinanced, foreclosed, repossessed, or converted to rental or office in the home.
- If you claim vehicle expenses, the business mileage for each vehicle. Also the December 31 odometer reading for each business vehicle.
- Year-end statements supporting deductions for mortgage interest and taxes.
- Receipts from Goodwill-type charities if you claim more than $500 in non-cash donations, showing dates, addresses, and descriptions.
- Legal papers for adoptions or divorce, if not previously sent to us.
- Any correspondence sent to you by the IRS or other taxing authorities.
- Copy of 2016 tax return(s) filed by any dependents you are claiming.
- Printout from all casinos showing winnings and losses. Copy of wagering log.
- If you are mailing, dropping off, e-mailing, or faxing the information to us, a retainer for the same amount as last year's fee. We accept checks, credit or debit cards (see yellow Tax Appointment form).

DEADLINES:	Prepare return without an extension	Mar. 17
	Prepare an automatic six month extension	Apr. 12
	Prepare return if an extension has been filed	Sep. 15

If you want us to send a payment to IRS with your extension, we must have your check made out to “United States Treasury” in our office by April 15.

We charge at least a $150 express processing fee for information received after Sep. 15 or between March 17 and April 12 where you refuse to file an extension. We will prepare an extension at no charge per your request or if we receive your information by April 12.

Thank you for the opportunity to serve you. We gladly accept referrals.

Sincerely,

Bob McCombs & Company, CPA's

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