<u>Bob McCombs, CPA</u>

Dear New Individual Tax Client:

Thank you for your inquiry about our services. We have been preparing income tax returns since 1975 and look forward to a mutually beneficial business relationship.

We ask that you have available the following information at the time of your appointment:

- The **<u>SIGNED</u>** "Questions" sheet with the relevant boxes and boxes 1 & 2 checked. These questions are designed to help us learn as much about you as possible so that we can meet your specific needs. The "Professional Service Agreement" on the back states the terms by which we prepare returns.
- The purple "Consent Form" signed by <u>both</u> taxpayer and spouse.
- Copy B of all IRS forms you have received (such as Forms W-2, 1099, 1098, .
- Form 1095-A from the health care exchange.
- Final year-to-date paycheck stub from all employers.
- Copy B of Form 1098-T's showing tuition. (This form is sent to the student) Also, the university tuition payment transcripts.
- 2018 and 2019 Form 5498 from your IRA and HSA accounts.
- If you sold investments, 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, repossessed, foreclosed or converted to rental or office in the home use.
- 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 <u>non-cash</u> donations, showing dates, addresses and descriptions.
- Legal papers for adoptions or divorce.
- Any tax notices sent to you by the IRS or other taxing authorities.
- Copy of 2019 tax return(s) filed by any dependents you are claiming.
- Printout from all casinos showing winnings and losses.
- Copies of your last three income tax returns, including depreciation schedules.

DEADLINES:	Prepare return without an extension	Mar. 15
	Prepare an automatic six month extension	Apr. 13
	Prepare return if an extension has been filed	Sep. 15

If you want us to send IRS a payment with your extension, we must have the check made out to "United States Treasury" in our office by April 13.

We charge at least a $500 express processing fee for information received after Sep. 15 or between Mar. 16 and Apr. 15 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 Apr. 13.

We have enclosed our marketing brochure, calendar, and business card. This information and more is also available on our website http://www.dentoncpa.com.

Bob McCombs, CPA

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