



PICKERING WILLIAMS MAGEE

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CLIENT TAX LETTER

We have provided a check list to help you organize your tax information. If you use or need an organizer, call us and we will mail one to you. Our appointments fill up quickly, so call early to schedule your choice time. For your convenience, **you may drop off your paper work without scheduling an appointment.** At time of drop off you will be asked to fill out some additional paperwork relating to tax law/procedure changes. As always, we appreciate your referrals and look forward to starting a new relationship with your family and friends.

POINTS TO REMEMBER

- **Direct Deposit:** Submit a voided check. A deposit slip is not valid.
- **Consent/Disclosure Agreement:** Go to pwmtaxprep.com/all-about-taxes, Click REQUIRED FORMS TAB, and complete
- **Inform us** of any changes that may affect your tax situation, such as: have you changed your address, added or dropped a dependent? If you married in and changed your name, did you notify Social Security Services?
- **Charitable contributions:** There is a new law. Regardless of the amount, donations of cash must be substantiated with a bank record or written receipt from the do-nee organization. Contributions of \$250 or more must include a written acknowledgment from the do-nee of the amount contributed and if goods or services were received as a result of the contribution.
- **Home mortgage interest deduction:** Some interest may not be deductible under Alternative Minimum Tax, and limited on Schedule A. You may be asked to furnish additional information.
- **Partnership and S Corporation returns:** There is a penalty imposed for failure to file a timely partnership and S Corporation return.
- **Extended Deductions:** The State and Local General Sales Tax Deduction, Educator Expense Adjustment to Income and the Higher Education Tuition and Fees deduction have been reinstated. If you paid taxes on a motor vehicle or boat, include the amount with your tax information.

NEWS

EXTENSION

LET US KNOW BY MARCH 31 IF YOU WILL NEED AN EXTENSION FILED.

PAYMENT PLANS AVAILABLE

PAYMENT OF YOUR TAX PREPARATION WILL BE REQUIRED WHEN YOU PICK UP YOUR COMPLETED TAX RETURN.