ALFANO & COMPANY LLC
www.alfanocpa.com

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January 8, 2018

Dear Client,

It's hard to believe it is tax season again! As we gear up for this busy time of year we are working to provide you with the very best possible service.

Remember: some tax deadlines changed as of last year. Please review the back of this letter to ensure you have in mind the correct due date for your tax return(s) – especially if you own a business!

We hope you have all been able to make good use of your **Client Portal**! Now that you've all had an opportunity to use the portal for one year we would like to encourage you to receive your tax return via the portal only. As with our last filing season, there will be a fee should you request a paper copy of your return.

In order to ensure your tax preparation this year is as painless as possible we'd like to remind you of the following points:

- **Returns are prepared in the order in which they are received:** please provide your tax information as early as possible to avoid the deadline crunch, eliminate any last minute problems, and ensure a quicker turn-around time.
- **Appointment slots are limited:** the sooner you book the more flexible we can be; please contact our administrative team (reception@alfanocpa.com) at your earliest convenience to book your meeting. Don't worry if you're as busy (or busier!) than us, though, you can feel free to simply **drop off your information or upload it into our portal** and we will get started on your tax preparation right away!
- **Information is due to our office prior to the deadline:** *complete* personal, trust, and c-corporation tax information must be provided to our office by ***March 19, 2018*** in order to be filed by the deadline. (Information for the preparation of partnerships and s-corporations which are due March 15th must be received by ***February 19, 2018***).
- **Don't forget outstanding information:** should our office request any missing information, this must be supplied by April 1st to guarantee a timely filing for personal returns. **If your tax information is received after these deadlines your tax return will automatically be put on extension.**
- **Don't forget to contact us for an extension:** unless requested, we will not automatically prepare an extension for any client; please contact us as soon as you think you may require an extension.
- **An extension is of time to file, NOT time to pay:** all payments are due to the federal and state governments by April 17th or you will incur unavoidable penalties and interest.
- **All returns must be e-filed**: if you are interested in receiving any potential refund as quickly as possible please **include a voided check** with your tax information and we will **have the refund directly deposited into your bank account**.

Thank you in advance for helping us make each tax year better and better! We look forward to seeing you soon.

Sincerely,

Alfano & Company, LLC

P.S. Thank you for your referrals; they are our most effective, and most gratifying, source of growth.

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January

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

01/15/2018 DUE DATE:
Final 2017 estimated tax payment due

02/01/2018
DUE DATE:
Mail or distribute W-2s & 1099s to receiptients

02/19/2018
ALL S CORPORATION & PARTNERSHIP INFO DUE TO OUR OFFICE

February

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28			

March

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

03/15/2018
DUE DATES
FOR S CORPORATIONS & PARTNERSHIPS:
-payments
-tax returns or extensions
-first 2018 estimated tax payments

03/19/2018
ALL PERSONAL, TRUST & C CORPORATION INFO DUE TO OUR OFFICE

April

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17				

04/02/2018
Any outstanding information due to our office

04/17/2018
DUE DATE FOR INDIVIDUAL & PARTNERSHIPS:
-payments
-tax returns or extensions
-first 2018 estimated tax payments

Don't Forget:

- □ SSNs and dates of birth for all family members (including any children born in 2017)
- □ Original W-2s & 1099s (interest, dividends, retirement or other income)
- □ Cost basis for stocks sold
- □ 1098(s) (mortgage interest)
- □ Real Estate Taxes and Car Taxes Paid
- □ Business & Rental Income and Expenses (email us to request a helpful organizer!)
- □ Legal Docs for sale or purchase of real property
- □ Other Itemized Deductions (i.e. donations & medical)
- □ Form 1095 (Healthcare Coverage)
- □ K-1(s) from businesses, estates/trusts, & investments
- □ Contributions to pension or retirement plans
- □ Amounts & Dates of any estimated taxes paid
- □ Void Check for Direct Debit or Deposit

You Should Know:

- Preparation fees are due upon pick up
- Returns are processed in the order they are received
- Optional audit correspondence is available
- E-filing is mandatory
- You must contact us to request an extension; taxes due must be paid with the extension
- Call to request a tax organizer
- It is your responsibility to review all returns before signing
- You can upload your tax documents to our secure portal!
- **Never Email SSNs or Bank Information**