



David F Alfano, CPA

3 Boulder Avenue | Old Greenwich, CT 06870 | 203-698-7700 | david@alfanocpa.com

January 7, 2019

Dear Client,

Welcome to 2019 and happy tax filing season! Here are some helpful reminders regarding your 2018 tax preparation.

Remember: there was a significant overhaul to the tax code beginning with the 2018 filing season; this means the tax forms underwent a makeover! Be sure to **bring your information in early** to avoid any surprises and give yourselves ample time to review and understand your returns.

This year, you're likely to find your **Client Portal** more valuable than ever! When you receive your completed tax return via the portal you are able to review it immediately, at a time and place that is convenient for you. Once your return is in the portal, you'll be able to access it any time you may need a copy; and if you've been utilizing the secure portal for the past few years you'll even have access to previous years for reference. **Skip the printing fee, opt for receiving your return via the portal only!**

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.
- **Don't meet with us before your return is prepared!** It's not that we don't want to see you, we just want to save you some time! Due to the new tax law you will benefit more fully from an appointment to *review* your completed tax return instead of one at the beginning of the preparation process. Please **drop off your information or upload it into our secure portal** and we will get started on your tax preparation right away! Of course, throughout the process we will contact you with any questions or concerns.
- **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 18, 2019** 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 18, 2019**).
- **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 15th 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.

Celebrating over 20 years in business! | www.alfanocpa.com

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		

✘ 01/15/2019 DUE DATE:
Final 2018 estimated tax payment due

✘ 01/31/2019 DUE DATE:
Mail or distribute W-2s & 1099s to recipients

02/18/2019
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						

✘ 03/15/2019 DUE DATES FOR S CORPORATIONS & PARTNERSHIPS:
-payments
-tax returns or extensions
-first 2019 estimated tax payments

03/18/2019
ALL PERSONAL, ESTATE & 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	18	19	20
21	22	23	24	25	26	27
28	29	30				

✘ 04/01/2019
Any outstanding information due to our office

✘ 04/15/2019 DUE DATE FOR INDIVIDUAL & PARTNERSHIPS:
-payments
-tax returns or extensions
-first 2019 estimated tax payments



Don't Forget:

- SSNs and dates of birth for all family members (including any children born in 2018)
- 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**