



David F Alfano, CPA

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January 6, 2020

Dear Client,

It's hard to believe this year we ring in a new decade along with the new year; happy 2020 to you and your family!

We're excited to announce we've expanded our tax preparation team with several new accountants this year. As always, we appreciate your referrals. Adding your family and friends to our client list is, by far, our most gratifying source of growth.

This year all clients will need to sign up for our **Client Portal**. While you may still request a paper copy of your return for a small fee, all clients will be notified that their return is ready for review via the secure portal. **Skip the printing fee, opt for receiving your return via the portal only!** Don't forget, once your return is in the portal you can access it any time you may need a copy; if you've been utilizing the secure portal for the past few years you'll even have access to previous years for reference. **Keep your sensitive information secure;** we encourage all of you to utilize the portal for transferring your tax documents to our office as soon as you have them gathered.

Taxes don't have to be a pain! Review these tips to have your best tax season possible:

- **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! Based on the experience of our clients, we feel you may 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 23, 2020** in order to be filed by the deadline. (Information for the preparation of partnerships and s-corporations which are due March 16<sup>th</sup> must be received by **February 17, 2020**).
- **Don't forget outstanding information:** should our office request any missing information, this must be supplied by April 1<sup>st</sup> 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 and you may be charged an expediate fee.**
- **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 15<sup>th</sup> 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

## January

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

**X 01/15/2020 DUE DATE:**  
Final 2019 estimated tax payment due

**X 01/31/2020 DUE DATE:**  
Mail or distribute W-2s & 1099s to recipients

**02/17/2020**  
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	29

## March

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

**X 03/16/2020 DUE DATES FOR S CORPORATIONS & PARTNERSHIPS:**  
-payments  
-tax returns or extensions  
-first 2020 estimated tax payments

**03/23/2020**  
ALL PERSONAL, ESTATE & C CORPORATION INFO DUE TO OUR OFFICE

## April

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

**X 04/01/2020**  
Any outstanding information due to our office

**X 04/15/2020 DUE DATE FOR INDIVIDUAL & PARTNERSHIPS:**  
-payments  
-tax returns or extensions  
-first 2020 estimated tax payments



### Don't Forget:

- SSNs and dates of birth for all family members (including any children born in 2019)
- 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 before your tax return is e-filed
- 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**