

To help us ensure no income or deductions are missed in your tax preparation and due to increased scrutiny by the IRS on the procedures of tax preparers we need you to answer the following questions before we can complete your return.

- Y N N/A Did you change jobs or receive unemployment compensation during the year?
- Y N N/A Did you receive interest or dividend income or sell/exchange any capital assets (stocks, bonds, homes)
- Y N N/A Did you receive, sell, send, exchange, or acquire financial interest in any virtual currency?
- Y N N/A Did you receive rent from real estate or other property?
- Y N N/A Did you make any withdrawals from or contributions (other than through your employer) to a retirement plan?
- Y N N/A Were you self-employed or did you receive any hobby income?
- Y N N/A Were there any births, deaths, marriages, divorces or adoptions in your immediate family?
- Y N N/A Did you pay interest on a student loan for yourself, your spouse or a dependent last year?
- Y N N/A Did you pay expenses for yourself, your spouse, or a dependent to attend classes beyond high school?
- Y N N/A Did you pay substantial medical expenses (10% or more of your adjusted gross income)?
- Y N N/A Were your HSA distribution used completely for qualified medical expenses? (Does not apply to FSA accounts)
- Y N N/A Did you make any charitable contributions: cash, noncash, or mileage to perform charitable service?
- Y N N/A Did you receive any correspondence from the IRS or other taxing authority during the year?
- Y N N/A Did you give gifts totaling more than \$15,000 to one person?
- Y N N/A Did you own or have signature authority over a foreign bank account, trust, pension, or business?

If so, did the total combined max value of all foreign accounts reach or exceed \$10,000 at any point in 2019? Y N

- Y N N/A Do you have appropriate documentation to substantiate business mileage and expenses for your records?
- Y N N/A Has your address changed since your return was filed last year?
- Y N N/A Have you made any other changes this year that may affect your tax situation?
- Y N N/A Is the information that you have provided to us for your tax return complete & accurate to the best of your knowledge?
- Y N N/A **Did you make any estimated tax payments for this tax year?**

If you circle "yes", please provide the dates and amounts paid for each estimated tax payment.

- Y N N/A Did you receive any dependent care benefits from an employer?
- Y N N/A Are any of your potential dependents enrolled in secondary education?
- Y N N/A Would you like to take advantage of our direct deposit option? **(IF YES, PLEASE INCLUDE A VOID CHECK)**

If your 2018 refund was direct deposited and you would like to use the same account for any expected 2019 refund, please confirm the name of the bank we have on file: _____

- Y N N/A If you have an overpayment, do you want the excess tax applied to your 2020 estimated tax (instead of being refunded)?
- Y N N/A Would you like to opt into our optional Audit Correspondence Plan for your 2019 tax return? (See back for details)
- Paper & Portal Portal How would you like a copy of your tax return? **If you request Paper & Portal there will be an additional \$25 fee**

Name: _____ **E-Mail Address:** _____



Why you should choose “Portal Only”:

Instead of receiving a paper copy of your return (which once reviewed should be securely locked up in a safe or deposit box) you will only receive a copy of your return in our **secure online portal**. Once your return is prepared and ready for your review you will be notified by e-mail with instructions to set up your personal login. You can review the return and then download and sign any action items necessary to file your return. For the next three years you will then have the ability to download and print the return whenever you may require it (for FAFSA or loan applications, for example). With access to your portal set up you will also be able to SECURELY upload your tax related documents for our team (this is FAR more secure than e-mail!), as well as any other personal information you would like to keep safe (passports, wills, insurance policies, etc.). By selecting Portal only this year you will also avoid a \$25 handling fee. Should you have any questions or concerns please e-mail us (reception@alfanocpa.com) or call the office 203-698-7700.

What is the Audit Correspondence Plan?

As federal and state budget deficits balloon out of control, the IRS and other taxing authorities are working harder to chase every tax dollar. Your odds of getting audited or receiving other unwelcome correspondence is climbing every year. We handle many of these notices and have found that the IRS computers are often inaccurate. However, the IRS assumes their conclusions are correct unless you prove otherwise.

Responding to simple written notices can be expensive and time-consuming, and responding to an actual audit can mean real financial disruption. Here at Alfano & Company we’ve created our **Audit Correspondence Plan** to help shield you from those unexpected costs. For an additional fee of 20% of your regular tax return preparation fee (minimum of \$200) we handle all written correspondence related to notices received from federal or state taxing authorities related to this year’s tax return. Please note that this is an annual service and covers only your 2019 Federal and State tax returns. Should you need further representation, in person or over the phone, you will incur additional fees from our office.