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# Marino and Associates, Inc.

January 2018

Dear New Client:

Welcome.

New for 2017 tax year:

- Health insurance is required and you should have received form 1095 (or SSA-1099). Bring this form to your tax appointment.
- Bring your drivers' license or state ID to your tax appointment.
- If you are claiming a dependent on your tax return, IRS wants you to show us documentation to that fact. So, bring with you to your tax appointment, some documents showing your name, the dependent's name, your address and the 2017 date. This could be a doctor bill, school record, etc.
- If you have college tuition paid, bring your paper copy of form 1098-T issued to you from your college or university. In addition, if the form 1098-T does not show the payments received for qualified tuition and related expenses (in Box 1), then we need your documentation of tuition paid, like canceled checks, receipts or account statement.
- If you are required to file a form W-2 for your employees or form 1099 for your subcontractors, the new due date is January 31st each year.

With the rising home prices, some of our clients are thinking about selling their homes. Since this can be a taxable event, you should talk to us, first.

Please follow these steps:

- Complete the Tax Organizer and Engagement letter, first.
- Gather all your 2017 documents and information.
- When you have all your documents and information, call for an appointment. If you are missing one or two documents that you know come in late, like K-1's or stockbroker statements, you can still schedule an early appointment. We will add the missing documents when you drop them off at our office.

It is important to complete your tax appointment early rather than later. We are planning on a very busy tax-filing season.

*Income Tax Preparation Services*  
*fast and painless*



If you want to avoid the rush, we can file for an extension for you. As long as you do not owe any taxes or make an estimated tax payment with the extension, an extension gives you until

October 15, 2018 to file your individual tax return. Actually, if you have a refund due, you have three years, until April 15, 2021 to claim it. There are generally no penalties for filing late when you are due a refund.

For our clients who cannot manage my stairs, you can call our office for help in avoiding our stairs.

I have enclosed a copy of my “2017 Tax Organizer and Deduction Finder”. I hope you find this a valuable tool. Please bring this completed organizer and the enclosed “Engagement Letter”, signed by you and your spouse (if applicable) to your appointment.

When completing the “2017 Tax Organizer and Deduction Finder”, read the whole line. Some lines have more than one item. If anything in the statement pertains to you, check the box. If you are not sure, put a “?” in the box and your tax preparer will better explain it to you.

Beware of scammers and swindlers. Do not respond to any telephone calls, emails or letters that you suspect may not be legitimate from the IRS or other taxing authority. Call our office, first.

See - <https://www.youtube.com/watch?v=0y5z0kWgBcM>

Daily, we receive suspicious emails. If we do not respond to an email from you, call our office.

Make sure to bring your copy of your last 3 years of filed tax returns (paper copies, only).

Please feel free to call me at 503-239-4716, with any questions or concerns. We look forward to seeing you.

Sincerely,

Dale Marino EA LTC