



The Tax Shoppe



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ANOTHER NEW YEAR! WHO CAN BELIEVE it's 2011 already.....

We look forward to hearing from you and providing you with the best service for your 2010 tax return. One of our newest updates is that we are now on Facebook and we encourage you to become our fan. We post important tax announcements for you all year round. We also have information and useful links on our website. Please take a few moments to review some of the important information to know when sending us your tax papers:

- Fill out the enclosed **2010 Checklist** with **current address, phone numbers & e-mail**
- Signing the enclosed **Form 8879** gives us permission to electronically file your taxes. The IRS mandates us to e-file.
- Include **copies** of your W-2s and 1099s (Pay stubs are NOT preferred)
- Do not send original receipts for your expenses, just the summaries of the totals on the checklist
- List any **new or loss of dependents**. Include their name as shown on their SS card, their SS#, DOB and relationship

2010 CHECKLIST is designed to help you organize your income and expenses. Please be aware that the IRS has increased its letter audits in the area of itemizations. We can deduct any expenses you give to us; however, the IRS would require documented proof of expenses should they ever audit your return. Keep records & documentation **at least 3 years**.

GETTING IT TO US You can send your data via **U.S. Mail, E-mail, Fax** or **bring it in person**, either to our Ramsey or Hackensack office. Phil can be seen by appointment only. **All appointments should be made through the Ramsey office.** Below are the hours Phil is available in Hackensack (only 2 days a week) & the Ramsey Offices. Late night appointments are also available at Ramsey only. Appointments fill up quickly. **Call at least 2 weeks prior** to your anticipated appointment date.

	<u>Appointment Hours In Hackensack</u>	<u>Appointment Hours In Ramsey</u>	<u>Ramsey Office Is Open</u>
Wed	10 am – 2 pm	2 pm to 10 pm	8:30am to 7 pm
Mon, Tues, Thurs, Fri	no appointments	8:30am to 10 pm	8:30am to 7 pm
Saturday	10 am to 2 pm	2 pm to 5 pm	9 am to 5 pm
Sunday	no appointments	10 am to 10 pm	10 am to 7 pm

ELECTRONIC FILING IS FREE and it's the best way to insure the IRS receives your return. If you use direct deposit, your refund comes in 7 - 10 days. We must have a signed Form 8879 on file. If you choose to e-file & receive a paper check, it comes in 14 - 21 days.

PERSONAL PROTECTION PLAN When your **2010** tax return is covered with our Personal Protection Plan (PPP), we will respond to any IRS or State **letter audits** which the government may send up to 2014. PPP coverage costs only \$29 (less than \$10/yr). Without the Plan, our regular fee is \$75/hour with the average audit taking 3 hours. Take advantage to have year-round **peace of mind**.

PAYMENT We accept Cash, Checks, Credit Cards, **IRS Split Refund** (payment can come out of your refund. This can only be done with Direct Deposit). Please remember that payment is due at the time services are rendered.

In closing, let us remind you of the many services we offer: preparation of Individual, Business & Estate Tax Returns, year-round financial planning & other tax matters, and we have a **Real Estate Brokers' License** (we can **lower the sales commission** you pay and/or reduce your closing cost with a generous closing gift or check).

Until we hear from you....hoping in the coming year we have a better economy and you have good health and much success!

Respectfully,

Phil & The Motley Crew