

The Tax Shoppe

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Well, It's here ... 2 0 1 2 ! It's just another year...

Hopefully it's a better year for you and the government. We are dedicated to give you the best service possible in handling your 2011 personal and business tax returns. It is our goal to make the process of filing your taxes as painless as possible and do everything we can to save you money.

WHAT TO SEND US Please follow these guidelines to ensure expedient and accurate handling of your documents:

- Fill out the enclosed **2011 Checklist** with **current address, phone numbers & e-mail**. This information is never redundant as it is a confirmation that we have your correct data on file
- Sign the enclosed **Form 8879** (two signatures required for married filing joint returns). This gives us permission to electronically file your taxes. The IRS mandates us to e-file. We cannot e-file without it. E-Filing is FREE!
- Include **copies** of your W-2s and 1099s (Pay stubs do not give us complete information)
- Do not send original receipts for your expenses. Just include an itemized list rather than the receipts
- List any **new or changes of dependents**. Include their name (as shown on their SS card), their SS#, DOB and relationship

2011 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 that are allowed; however, the IRS would require documented proof of expenses should they ever audit your return. Keep records & documentation for **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 need to be made through the Ramsey office.** Late night appointments are also available at Ramsey only. Appointments fill up quickly. Call **at least 2-3 weeks prior** to your anticipated appointment date. For those of you who drop off in Hackensack, Phil is there Wednesdays & Saturdays 10 am ó 2 pm.

PERSONAL PROTECTION PLAN Since we've offered this plan a few years ago, we've seen a huge jump in the amount of correspondence the IRS & State agencies send out. When your 2011 tax return is covered with our Personal Protection Plan (PPP), you won't be left to respond yourself. We will respond to any **IRS or State letter audits** which the government may send up to **2015**. Average cost is \$29 (less than \$10/yr). Some additional rates apply for businesses. Please see our website for price details. Our response includes any correspondence or three-way phone calls if necessary. Without the Plan, our regular fee is \$75/hour. An average paper audit takes about three hours. We highly recommend this coverage to our clients.

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.

OUR WEBSITE Check it out! Our website is a treasure trove of information. From links to every State Department of Revenue in the country to the most important current tax tips, there is a lot of tax information there for you. We encourage you to take a few moments to add us to your favorites list. We also have a link right on our homepage to our client portal where the documents we transfer to you are encrypted to ensure your information is never compromised.

FACEBOOK Always up-to-date information to keep you up on important deadlines, changes and money-saving tax tips.

In closing, let us remind you of the many year-round services we offer: preparation of Individual, Business & Estate Tax Returns, business formations and consulting, corporate startups, small business quarterly tax filings, IRS representation, Offer In Compromise, financial planning & many other matters. Also, don't forget 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 youí .hoping in the coming year we have a better economy, and you have good health and much success!

Respectfully,

Phil & The Tax Shoppe Staff