



George and Donna's Bookkeeping & Tax Service

Welcome to All of our Family, Friends and Guests!

Happy Holidays!

As in the past the purpose of this letter is to help you get ready for Tax Season! This coming year being a Leap Year you get an extra day to prepare for taxes. Just a side note the IRS allows us now to give you an electronic copy of your taxes, in lieu of the paper copy. So, if you would like to have a "pdf copy" of your file we have flash drives available for just \$10.00.

As you start to receive your tax documents in January please gather them and put them together in a safe place and remember to bring them with you. We need all **W2's**, **1099's**, **1095's** (healthcare) to complete your taxes

- As usual we need: your correct name (as it appears on your social security card), your current address, and email address and both your cell phone telephone numbers and your landline (if you have one).
- Did you buy, sell or refinance your home or rental property? If so, we need you to bring your closing documents to get deductible items off the Escrow papers.
- Did you add any dependents or did any move away? Remember if you still provide over 50% of their support you may be able to claim them on your taxes. Be sure to mention to your kids not to file without showing that they are a dependent on your taxes. If you added a new dependent, please be sure to bring their social security card, or copy thereof, with you.
- Did you start an **IRA** (Individual Retirement Account) this year? If so, please bring in the amount that you contributed, so we can reduce your taxable wages. If you took any withdrawals from these accounts bring in the **1099-R**.
- Did you have any medical expenses? This includes Insurance Premiums, Doctors, Dentists, Chiropractors, Hospitals, Eye Exams, Prescriptions along with the mileage going back and forth to these offices.
- Remember Property Taxes, DMV Fees, along with any other fees or taxes you pay out.
- Did you have any childcare services paid out for a dependent? We need to have their Name, Address and Tax ID Number to be able to deduct these on your taxes.
- Did you make any Charitable Contributions this year? You still have six weeks, so clean out the closets, go through the cupboards and garage and get them down to Goodwill, Salvation Army or to your local Church or Synagogue. Remember three things to do: 1. Make a List of the items being donated, 2. Take Pictures of the clothes, books or household items, and 3. Get a Receipt. If you volunteer, get the mileage and any costs you put out for that organization.
- Did you have any educational expenses or training expenses? The IRS limits what we can take off, but we can still take these off on the State of California. Remember to get a 1098-T from yours and your kids Schools.
- Did you have a business that needed the use of a Home Office? Be sure to bring in the totals for your Utilities, Cell Phones and any Professional Dues, Fees that you had to pay.



- Did you have any Union Dues or Fees that were paid this year? How about the miles going back and forth to the Union meetings?
- Did you purchase any Uniforms or Items needed for your profession?
- Did you look for work? Remember mileage and supplies for this.
- Do you have a Rental Property? Be sure to bring in all the Revenues and Expenses that you had this year.
- TO HAVE YOUR TAXES DEPOSITED ELECTRONICALLY OR TAKEN OUT WE NEED TO HAVE YOUR BANK INFORMATION INCLUDING ROUTING NUMBER AND ACCOUNT NUMBER.

This is just a brief list to help you get started. Please remember we are available seven days a week but only after 5:30pm Monday through Friday and all-day Saturday and Sunday. We ask that you make your appointment as early as possible so we can schedule you when you are ready.

Our rates may be going up a little this next year but for new clientele our rates are as follows:

- Basic Tax Returns starting at \$100.00 (this includes Electronic Filing)
- Corporate Returns will start at \$350.00
- Partnership Returns will start at \$350.00
- Flash Drive with an Electronic Copy will be \$10.00
- Electronic Copies requested after taxes are prepared will be \$15.00
- Amendments to taxes that we prepare start at \$50.00
- If we need to mail any paperwork or taxes, we charge a flat \$25.00

We continue to strive to keep our rates lower than any of our competitors. If you find a lower rate, please let us know and we will try to adjust ours. We always feel that our clientele are more important than the rate which we charge.

We ask for payment at the time service is performed. We accept Cash, Check, Credit Card, Zelle, and Paypal.

Please call to make your appointment when you are ready! If you have any questions, please feel free to give us a call! (909) 796-7681 **Please do not schedule an appointment until you are sure you have all of your documents!**

We are looking forward to seeing you all again this year! After doing taxes for over the past 35 years we have an amazing clientele and wish you all a Very Happy Thanksgiving, Merry Christmas, Happy Hanukkah and of course a Happy New Year!!!

Thank you again for your referrals! Remember we give you back a credit when your referral comes to get their taxes done.

George and Donna McNeil
George and Donna's Bookkeeping & Tax Service