Dear Client, January 9, 2019

Thank you for your business this past year! I hope to earn your business again this year! The tax return you are filing for 2018 has many changes in comparison to 2017 tax laws

Some of the changes:

- The new federal withholding tables gave most taxpayers larger paychecks throughout the year. Unfortunately for some they were not designed to give refunds at year end so many people will have received their tax savings in their paychecks.

- The ability to itemize deductions has been drastically decreased due to the new laws. However, still bring all your items to itemize because many of you will itemize on state even if you can't on federal taxes.

- A major change has occurred on home equity lines and 2nd mortgages, most of which are now not deductible. Additional questions will be asked regarding these items.

- Employee work related expense are no longer deductible on the Federal return, but we still need the information for your state return.

- Home related energy efficient credits except solar, wind and geothermal have expired.

I will be offering few different opportunities to get your taxes prepared:

- Drop them at my home, there is a locked dropbox on the wall outside the business entrance. Or drop them off during business hours (listed on my website)

- An appointment at my home office, which has a separate business entrance.

You can electronically set up your appointment at http://hopestaxservicellc.schedulista.com. Or if you prefer you can email, text or call me to set up your appointment.

- Mail them to me

I will be offering appointments:

Mon, Wed and Thur 9am-8pm
Tues 4pm-8pm
Fri and Sat 9am-4pm
Sunday 12pm-4pm

There is an organizer for your assistance in gathering your tax documents. There is also a summary list of forms needed to prepare your taxes, which you can use as a checklist in making sure you have your forms.

Before I can submit your tax return to the IRS this year, I **MUST** have payment for my tax preparation services, the electronic filing forms signed by all taxpayers and all taxpayers photo ID's (you can provide copies with your documents).

Any referrals are always greatly appreciated. I love to save people money from paying high tax preparation prices and advise them in any way I can on their taxes. You can find me on facebook at Hope’s Tax Service.

I appreciate your business and enjoying preparing your return each year!

Thank you!
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FORMS NEEDED TO PREPARE YOUR TAXES: CLIENT NAME:____________

- W-2 ________ SELF ________SPOUSE
- Interest Income, Dividend Income, Reports from stock accounts
- Mortgage interest/property tax statements (FORM 1098)
- 1099's - (R-retirement fund, INT-interest income, DIV-dividends, MISC-miscellaneous, G-government/unemployment, SSA-social security statement, B-stock sales (need cost basis)
- Bank Information – Routing # and Account # (direct deposit of refund)

Routing:_______________________________Acct:______________________________

- HSA- Health savings accounts
- K-1's-Corporations, Partnerships
- W-2G- gambling income
- Additional dependents Name____________________________ DOB________________ SSN_______________
- College Tuition statements or interest on tuition (form 1098-T)
- Childcare information – Name of Caregiver__________________SSN/EIN__________________

  Address____________________________________ Total paid___________________

- Proof of Insurance (form 1095-A, B, or C). Only if you've received it.
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- ADDITIONAL IF APPLICABLE:
- Donations receipts
- Medical insurance paid (out of pocket and Medicare on your SSA statement
- Vehicle registration
- LIST of Expenses IF self-employed and/or home office
- Long Term Care Insurance
- Medical bills, prescriptions -TOTAL AMOUNT will need to exceed 7.5% of income
- Medical Miles if medical exceeds 7.5% of income
- Traditional IRA contributions
- LIST of work expenses if required for work (only to be used on State returns)