

The Tax Professional

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****PLEASE RETAIN FOR YOUR REFERENCE****
NEW FOR TAX YEAR 2011

Dear Friends,

Happy New Year! This letter is to address some of the critical tax year changes and concerns that you might have and it is one that you should keep after you return the Organizer to me. Please make sure you have done the following before sending your tax documents in:

- SIGNED** and **DATED** the **FRONT PAGE** of the organizer and return the **ENTIRE Organizer** to me. (One signature by a couple filing jointly is sufficient.)
- Please indicate by which mail method you prefer to have the taxes returned to you. *Please **do not send taxes "signature required for delivery"** as that will increase processing time by an additional week.* In order to receive the **Early Bird Discount of 10%**, **Organizers must be postmarked by February 15, 2012.**
- If you use the self-addressed envelope I have enclosed, you must put **Priority postage** on it. Also, please **remember** to put **your return address** on the envelope when sending your tax information to me.
- Be sure to answer all **Yes/No questions** on ORG 3 which consists of 2 pages.
- On ORG 6, be sure that all contact information is up to date. Also note the **number of months** you supported your children and if **NOT claiming them**, please **cross them off**. For your convenience, you may make address and/or phone number changes or request an extension by accessing our web site at: www.thetaxprofessional.net.

In order to receive your tax returns by April 16, 2012, ALL information must be in our hands by March 10, 2012. If we are unable to meet this deadline you will receive a 10% discount.

- **ELECTRONIC FILING** and **DIRECT DEPOSIT** are **NOT** the same thing. You may select either one or both. I do not charge for these. If you choose to have Direct Deposit, you **MUST** include a **voided check**. Internal Revenue Service guidelines mandate a **new voided check each year**. We *cannot* use the one provided the previous year or the information noted in your organizer.
- **CASH** and **NON-CASH CONTRIBUTIONS** may now be recorded on the green sheets included in your tax packet for your convenience.
- **MILEAGE:**
 - 2011 mileage rates: Business **Jan. 1st – June 30th** is **51¢** per mile & **July 1st – Dec. 31st** is **55.5¢**
 - Charitable is **14¢**, Medical & Moving is **23.5¢**
 - Year, Make and Beginning and Ending mileage for each vehicle(s) **MUST** be provided.
 - **Business** mileage and **Total** mileage for each vehicle must be provided.

****Please see reverse for additional information****

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- **Child Care** is only allowed for children **12 years** and under.
- The maximum contribution for both traditional and Roth **IRA's** are the lesser of Earned Income or:
 - **\$5,000** for under 50 years of age - **\$6,000** for those age 50 or older
 - Roth IRA's have an income limit
 - You have until April 15, 2012 to make your contribution.
- **EXTENSIONS:** 2011 tax returns are due April 16, 2012. If additional time is needed, IRS Form 4868 (Automatic Six-month Extension) will **ONLY** be filed on your behalf **IF** you contact us or we already have your paperwork in the office. No automatic extension can be filed without some 2011 information and your authorization to file it on your behalf. An extension request can be found on my website – www.thetaxprofessional.net

An extension gives you until October 15, 2012 to file your taxes. In order for me to get them back to you by the deadline date, I must have your taxes in my office by September 20, 2012.

Once you have received your taxes, you MUST return all E-File Authorization Forms before your taxes can be electronically filed.

Sincerely,
Martha Yung, E.A.