

# THE TAX LADY LLC

## OFFICE HOURS:

JANUARY 6-31, 2020

MONDAY-FRIDAY:

8AM-4:30PM

FEBRUARY-APRIL

MONDAY-SATURDAY

8AM-6PM

SUNDAYS ARE  
APPOINTMENT ONLY.

## FOOD BANK DONATIONS:

Bring in FIVE (5) non-perishable items at the time of your appointment or when you drop off your information to receive a \$5 discount. You will not get credit if you bring it at pickup time or after appointment. No Baked Goods, please.

## INCLEMENT WEATHER CANCELLATIONS:

Living in Western PA, we all know that our winter weather is unpredictable. If I make the decision to close the office due to declining conditions, you will have 48 hours to drop off information to have it completed the day you drop it off.

## DROP OFF RETURNS:

Our returning client drop-off sheet is included in the newsletter to help save you time. If you renewed your driver's license during 2019, please have that available at drop off to scan in. Your tax preparation fee and food bank donation are required when you drop off the information. For all drop off, you will receive a candy

bar and be entered into a drawing for free tax preparation for Tax year 2020.

## MAILING RETURN INFORMATION:

If you plan on mailing your tax information to our office, we ask that you send it Certified, Return Receipt so that you have proof of our receipt.

## FACTS PARENTS:

If your child attends a private school and you are required to complete the FACTS paperwork, please let the staff know this when you drop off your information. It will be completed within 24 hours of drop off.

## **TAX APPOINTMENTS:**

Bonnie's tax appointments are scheduled back to back during the day. If you are 15 minutes late your appointment becomes a drop off; Bonnie will complete it, but you will not be able to sit with her due to the time constraints of her day.

## **EXTENSIONS:**

Bonnie is studying for the US Tax Court Exam this year. Extensions will be limited. We do ask that you drop off your information as soon as possible so that it can be completed before April 15<sup>th</sup>. If an extension is to be filed, we must have your tax information in our office before April 10<sup>th</sup> so if there is missing information you will have time to gather it.

## **HEALTH SAVINGS ACCOUNTS:**

If you are enrolled in a Health Savings Account (HSA) with your employer, we will need your last pay stub of 2019 to show your exact contribution to your account. Your contribution is tax deductible. You should receive a Form 5498-SA from your employer by January 31, 2020.

## **PROPERTY REBATE:**

You must have STAMPED "PAID" PROPERTY TAX RECEIPTS in order to receive the Property Rebate. If your home has a mortgage that pays the taxes out of escrow, you can use the Form 1098 that you receive with your mortgage interest or your last statement of the year.

## **PHONE NUMBER:**

PLEASE PUT OUR PHONE NUMBER IN YOUR CONTACT LIST SO THAT WHEN YOUR RETURN IS READY IT WILL COME UP "THE TAX LADY" SO THAT YOU KNOW IT'S US. 814-410-3578

## **Our 2019-2020 Fee Schedule:**

Individuals under 70 years: \$80 QBI Simple-\$25 QBI Complex-\$50

Club 70+: \$15 (Food Bank Donation credit does not apply)

Club 90+: FREE (Food Bank Donation credit does not apply)

We pride ourselves on being proficient as humanly possible in completing each return. You can help us by not calling to check on status unless there is an issue that needs addressed. With nearly 25 years of tax preparation, we truly appreciate your continued support and trust.

## RETURNING CLIENTS

Did we prepare your 2018 Return? Yes\_\_\_ or If No, please fill out New Client Sheet

NAME\_\_\_\_\_

SSN#\_\_\_\_\_ CONTACT PHONE\_\_\_\_\_ DOB\_\_\_\_\_

JOB TITLE\_\_\_\_\_ EMPLOYER\_\_\_\_\_

EMAIL ADDRESS\_\_\_\_\_

### MARRIED FILING JOINTLY/SEPARATE ONLY:

SPOUSE\_\_\_\_\_

SSN#\_\_\_\_\_ CONTACT PHONE\_\_\_\_\_ DOB\_\_\_\_\_

JOB TITLE\_\_\_\_\_ EMPLOYER\_\_\_\_\_

EMAIL ADDRESS\_\_\_\_\_

HAS ANYTHING CHANGED FROM LAST YEAR? NO\_\_\_ (SKIP TO STATUS BELOW & SIGN)

IF YES, PLEASE COMPLETE THE FOLLOWING:

\*DID YOU MOVE? \_\_\_\_\_

NEW ADDRESS\_\_\_\_\_

MOVED WHEN\_\_\_\_\_

\*ANY ADDITIONAL **CHILDREN**: YES\_\_\_ OR NO\_\_\_

CHILD'S NAME: \_\_\_\_\_ DATE OF BIRTH\_\_\_\_\_

SOCIAL SECURITY\_\_\_\_\_

\*DID YOU CHANGE EMPLOYMENT: YES\_\_\_ OR NO\_\_\_

NEW JOB\_\_\_\_\_ WHEN\_\_\_\_\_

\*DID YOU FILING STATUS CHANGE? YES\_\_\_ OR NO\_\_\_

SINGLE\_\_\_ MARRIED\_\_\_ WIDOWED IN 2019\_\_\_ SPOUSE'S DATE OF DEATH\_\_\_\_\_

DEATH CERTIFICATE PROVIDED \_\_\_\_\_

SIGNATURE\_\_\_\_\_ DATE\_\_\_\_\_

SPOUSE\_\_\_\_\_ DATE\_\_\_\_\_