



January 20, 2019

Dear Client,

We are grateful and excited to be celebrating our 29<sup>th</sup> year in business and it's thanks to you!

We truly appreciate your confidence, support, and referrals. We strive to earn a new client's trust and faith and hope to serve them for years to come as well.

**To serve you more efficiently, please take note of the following important reminders:**

[Visit our websites listed above for answers to many questions and a variety of good information.](#)

[Email Cathy \(cathy@magascpa.com\)](mailto:cathy@magascpa.com) - to request a tax organizer, to schedule all appointments, and to get answers not available on the websites.

[Consult George](#) - (see above contact info) PRIOR to any decisions regarding **Social Security, retirement income planning, incorporating, rolling over retirement funds and investments.**

[Email Kevin \(Keving@magascpa.com\)](mailto:keving@magascpa.com) - with tax and/or payroll questions, and with additional tax information to be added.

[Email Kyle or Julie \( kyle@magascpa.com or julie@magascpa.com \)](mailto:kyle@magascpa.com) with any tax questions.

[When gathering tax information](#) - Please take everything **OUT OF ENVELOPES, use paper clips only**—DO NOT STAPLE, separate all government forms from your own notes, and list all contributions/donations designating noncash and cash separately. You will need to include the name of the organization, address, date, and amount. Include all **investment statements and retirement accounts in your packet** and let us know if you would like to **rollover** an account and/or set up a **free consultation** to review your accounts. All your assistance with the above is greatly appreciated and makes the process run much more smoothly.

[Important dates & fees](#) - **March 29, 2019** - Last day to submit taxes to guarantee completion by **April 15, 2019**. **March 23, 2019** – Last day to have a scheduled tax preparation appointment. **April 15, 2019** – 2018 1040 Income Tax Returns due. Our tax preparation fees are based on organization of information, number of forms required to file, and complexity. **Our pricing will be a little higher this year because of the extensive changes made by the Tax Cuts and Jobs Act. We have spent many hours of training on the new law in order to help our clients.** Prices are subject to change if changes are made after already completed return. Extension filing fee is \$60 **and** you must notify me in writing to request an extension, electronic copy (pdf) of return is \$25 for each year and for each form. Please drop your taxes off if possible but if you need an appointment with George there is an additional meeting charge of \$75.00.



[Tax Cuts and Jobs Act \(TCJA or the Act\)](#) - 2018 has marked the most changes to income taxation since the Tax Reform Act of 1986. Most provisions of the Tax Cuts and Jobs Act (TCJA or the Act) passed at the end of 2017 and became effective in 2018. Additionally, the landmark decision in the Wayfair case dramatically altered the state tax landscape.

While much TCJA guidance has come out, many areas of uncertainty remain as the Treasury Department works on regulations to address numerous missing parts and ambiguities contained in the legislation.

We remind you that tax planning should be addressed throughout the year as an integral part of tax/financial planning. As always, we encourage you to contact us to discuss how these issues impact your tax/financial position.

We look forward to working with you again this year and wish you a happy, healthy, and prosperous 2019!

Sincerely,

George S. Magas, CPA, PC

**Here to help you in 2019 .... George, Cathy, Nick, Julie, Adriana, Kevin, Kyle and Emma**