



George S Magas CPA PC
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Websites: magascpa.com or gmagas.retiresmarter.com

January 10, 2020

Dear Client,

We are grateful and excited to be celebrating our 30th 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) - to schedule all appointments, to get answers not available on the websites, and with any billing questions.

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

Email Kyle (Kyle@magascpa.com) - with tax and/or payroll questions, and with additional tax information to be added.

Email Kevin or Julie (keving@magascpa.com or julie@magascpa.com) with any tax questions and to request an organizer.

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 non cash 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 27, 2020** - Last day to submit taxes to guarantee completion by **April 15, 2020**. **March 21, 2020** – Last day to have a scheduled tax preparation appointment. **April 15, 2020** – 2019 1040 Income Tax Returns due. Our tax preparation fees are based on organization of information, number of forms required to file, and complexity. 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. As I am designated as a "paid preparer," **I must receive payment before I can electronically file any return.**

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

We look forward to working with you again this year and wish you a happy, healthy, and prosperous 2020!

Sincerely,

George S. Magas, CPA, PC

Here to help you in 2020 George, Cathy, Nick, Julie, Adriana, Kevin, and Kyle