

Dear Clients,

Tax Return Organizer

Enclosed is our organizer which will help you compile your tax data. Complete all applicable items and bring it with you for your scheduled appointment, or mail or fax it to us. **Just fill in all the information requested on Sheets 1, 2 and if applicable 3, 4 and 5.** Please round off amounts to the nearest dollar and use pencil to enter all financial data. If you anticipate a delay in completing this organizer, you may want to apply for an extension.

What Should You Bring to Your Appointment?

Your Data Organizer and all W-2s, 1099s and 1098s.

New Clients

Please bring with you your last three years of tax returns, if available.

Questions

If you have questions regarding our Organizer, or any other related item, please call us. We ask that you try to keep your call brief because of the heavy influx of incoming calls. Questions relating to particular tax issues will be answered during our scheduled meeting.

Office Hours	Monday—Thursday	10 am – 10 pm
	Friday	10 am – 7 pm
	Saturday + Sunday	12 pm – 9 pm

Schedule Your Appointment Online www.judakallus.com

Should You File 1099s?

If you are self-employed and have paid any freelancer, subcontractor or other individual \$600 or more in the course of your business during the year – the answer is yes. Copies of your 1099s must be mailed to the IRS by **February 28th** or March 31st if efiled.

If you want us to prepare your 1099s, download our 1099 data organizer from our web site, then mail or fax your completed organizer to us. On our web site, click Data Organizer and scroll to the bottom of the page for the **1099 Data Sheet**.

Extensions **Filing late without an extension will subject you to one of the most costly penalties, up to 25% of the tax due! So, don't delay!**

An extension to file your tax return is not an extension to pay your taxes. The IRS will grant you an extension without payment, but will charge you penalties and interest totaling up to 15% per year on the outstanding balance. Most states have similar rules with similar penalties for extensions and late payment. New Jersey penalties are much higher than most states. Therefore, if you file for an extension, it is best to fully pay the taxes due.

All best,



Juda Kallus, EA