



James F Rogers CPA PA

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Happy New Year !

Can it really be 2020? Did we just make another decade? Please know how much we sincerely appreciate your friendship, patronage and letting us help with your tax and accounting needs.

There are not many monumental changes in law for 2019. Most of the provisions of the Tax Cuts & Jobs Act (TCJA) took effect in 2018. There have been some updates related to the TCJA and in December the president signed a bill that modifies regulations regarding rolling over and distribution rules regarding certain retirement accounts. More details are on the web site.

Please remember we have Convenient Parking for our clients on the north side of our building, the “Old Town Center” in Wichita’s Historic “Old Town”. Our office is on the 2nd floor, northeast corner of First (one way east) and Mead, just east of the main downtown railroad tracks. The entrance to our building is on Mead street.

Please visit our Web Site!

<http://www.jamesrogerscpa.com>

And you can text us at:

(316) 371-6950

Remember, our email addresses:

jayna@jamesrogerscpa.com

cathy@jamesrogerscpa.com

jim@jamesrogerscpa.com

And, of course, we’d love to see you in person:

Our scheduled tax season office hours will be:

Monday through Friday 9:00 am to 5:30 pm (Lunch from 1:00 to 2:00)

Saturday 10:00am to 3:00 pm

Sometimes the outside entrance to the building will be locked. Please call and we’ll be glad to let you in. If these hours are not convenient, we can make other arrangements.

Please contact us by April 1st if possible. The *due date* for returns is **Wednesday April 15**. We are enclosing our worksheet for you to use as you see fit. It seems to work pretty well for a lot of people, even if not perfect for everybody. Just fill it in or use it as a guide and remember our “Things to Bring” checklist is on the back of this letter.

Jayna, Cathy and I look forward to hope to seeing you soon,

**JAMES F ROGERS CPA PA
CLIENT WORKSHEET**

2019

TAXPAYER

SPOUSE

Name	_____	_____
Soc Sec #	_____	_____
Occupation	_____	_____
Birth Date	_____	_____
Best Phone #	_____	_____
E Mail Address	_____	_____
Street Address	_____	Note: Names and SSN's must match Social Security Admin records
City, St, Zip	_____	

Dependents:	Full Name	Birth Date	Soc Sec #
1	_____	_____	_____
2	_____	_____	_____
3	_____	_____	_____
4	_____	_____	_____

Estimated Tax Payments:		----- FEDERAL -----	----- KANSAS -----			
	Payment #	Date Due	Date Paid	Amount	Date Paid	Amount
	Overpayment from 2018			_____		_____
	1	4/15/19	_____	_____	_____	_____
	2	6/17/19	_____	_____	_____	_____
	3	9/16/19	_____	_____	_____	_____
	4	1/15/20	_____	_____	_____	_____

Income:	(Please enclose 1099's & W-2's)	<u>Taxpayer</u>	<u>Spouse</u>
	Wages	_____	_____
	Pensions	_____	_____
	IRA Distributions	_____	_____
	State Tax Refunds	_____	_____
	Alimony Received	_____	_____
	Unemployment Compensation	_____	_____
	Social Security Benefits	_____	_____
	Other? _____	_____	_____

Adjustments to Income:	<u>Taxpayer</u>	Date	<u>Spouse</u>	Date
	Alimony Paid: SSN _____	_____	_____	
	Penalty, Early W/D Savings	_____	_____	
	Student Loan Interest	_____	_____	
	Teacher Classroom Exps	_____	_____	
	Keogh, SEP or Simple	_____	_____	_____
	Roth IRA	_____	_____	_____
	Traditional (Regular) IRA	_____	_____	_____
	Other? _____	_____	_____	

----- **Interest Received** -----

From:	(Please enclose 1099's)	Amount
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

----- **Dividends Received** -----

From:	(Please enclose 1099's)	Amount
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Sale of Stocks, Securities and Other Investments: (Please enclose 1099's)

Description	Date Acq	Date Sold	Sale Price	Cost Basis	Gain(Loss)
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

Itemized Deductions:

Medical Expenses

Medical Insurance	_____
Long Term Care Insurance	_____
Prescription Drugs & Medicine	_____
Eyeglasses	_____
Doctors, Dentists	_____
Hospitals & Labs	_____
Other? _____	_____
Insur. Reimbursements Recd?	_____
Medical Miles	_____

Interest Paid (Please enclose 1098's)

Home Mortgage: First	_____
Home Mortgage: Second	_____
Investment Interest	_____
Other? _____	_____

Charitable Contributions

Churches	_____
Charitable Organizations	_____
Other? _____	_____
Non-Cash? _____	_____
Volunteer Miles Driven	_____

Taxes Paid

Real Estate	_____
Personal Property (Autos etc)	_____
2018 State Tax Paid in 2019	_____
Other? _____	_____
Sales Taxes (Major Purchases)	_____

Please Note: The Tax Cuts & Jobs Act substantially increased the standard deduction to \$12,000 single, \$24,000 Married and \$18,000 HofH. Many taxpayers may not qualify for itemizing deductions

Tax Credits:

Child & Dependent Care

	Paid to	Address	ID Number	Amount
Child 1 _____	_____	_____	_____	_____
Child 2 _____	_____	_____	_____	_____
Child 3 _____	_____	_____	_____	_____

Education Credits

(please enclose 1098-T's)

Student Name	Exps Paid	Status During 2018 (ie. Fresh. Soph. etc)
_____	_____	_____
_____	_____	_____