

NEIL S. KAHN, P.C.
CERTIFIED PUBLIC ACCOUNTANTS
KAHN-CO PROFESSIONAL BUILDING
31547 W. THIRTEEN MILE ROAD
FARMINGTON HILLS, MICHIGAN 48334

Neil S. Kahn, CPA PHONE (248) 324-0980 FAX (248) 324-0808
nsk@neilskahnpc.com www.neilskahnpc.com

Ashley BK Grubbs, CPA
abkg@neilskahnpc.com

December 2019

Dear Prospective client:

The holiday season is upon us. As another year winds down, it is now time to complete our planning for 2019, start gathering and organizing the information to properly complete your 2019 income tax return and jump into planning for 2020.

To assist you in meeting these objectives, we have included a tax checklist for you to complete and a memo highlighting many of the important changes in the tax laws that may affect you. As you go through the checklist, please keep the following in mind:

1. If any information does not apply to you or is incorrect simply cross it out or make any necessary corrections.
2. Please be as detailed as possible. Keep in mind that the more information you supply and the better prepared you are, the more accurate your return will be and the greater chance we have to save you tax dollars.
3. If you have any questions or need assistance in completing the planner, please don't hesitate to contact us.

Tax planning continues to become much more complex and requires an examination of facts and circumstances. The tax laws continue to become increasingly complicated so it is important that we work as a team to save you the most tax dollars possible. If you need further assistance in personal and/or business planning, we offer a broad range of tax, accounting, computer, and financial services and would gladly discuss this with you.

We are looking forward to working with you in the coming months. We wish you and yours an enjoyable holiday season and a prosperous new year.

Sincerely,



Neil S. Kahn
Neil S. Kahn, P.C.
Certified Public Accountants

NSK/wg
NSK01615.E28.doc

QUESTIONS

If any of the following items pertain to you or your spouse for the year 2019, check the appropriate box and include all pertinent details and statements.

PERSONAL INFORMATION

Did your address change?..... [] []

New Address: _____

Current telephone numbers:

[Home](#)

Work (Taxpayer)

Work (Spouse) _____

Cell (Taxpayer)

Cell (Spouse)

E-Mail Address

E-Mail Address

What is your date of birth?

What is your spouse's date of birth? _____

Did your marital status change during the year?..... [] []

Drivers License: (If renewed during the year, please update)

[illegible]

Issue Date [][][] [][][]

Expiration Date [][][] [][][]

Issuance State [][]

Spouse

Issue Date [][][] [][][]

Expiration Date [][][] [][][]

Issuance State [][]

Financial Institution:

Routing number: [] [] [] [] [] [] [] [] [] []

Checking number: [] [] [] [] [] [] [] [] [] [] [] []

Savings number: [] [] [] [] [] [] [] [] [] [] [] []

Did this information change from last year? [] []

GENERAL

YES NO

Do you wish to designate \$3 to the Presidential Election
Campaign Fund?..... [] []
Does your spouse wish to designate \$3 to the Presidential
Election Campaign Fund?..... [] []
Were you notified by the Internal Revenue Service or other
taxing agency of changes to a prior year's return?..... [] []

ELECTRONIC FUNDS

If you are entitled to a refund, do you want the taxing
authorities to direct deposit this refund?..... [] []
If so, please provide:
Percentage to checking _____
Percentage to savings _____
Total 100%

If a payment is due with the filing of your tax return, would
you like to use electronic funds withdrawal?..... [] []
If yes, this will occur on April 15th unless you choose another
date. Would you like a different withdrawal date?..... [] []

DEPENDENTS

Are there any changes in dependents from the prior year? [] []
Are any of your dependents filing their own tax return or
have over \$1,100.00 of unearned income?..... [] []
Are you claiming dependent children that did not live
with you?..... [] []

PURCHASES, SALES AND DEBT

Did you sell, purchase or exchange any real estate
during the year? If yes, attach closing statements..... [] []
Did you refinance the mortgage on your personal residence
or take out a home-equity loan in 2019?..... [] []
If yes, attach closing statements.
Did you have uncollectible debts or securities that
became totally worthless during the year?..... [] []
Did you sell any property in 2019 for which you will
receive payments in future years?..... [] []
Did you have any debts cancelled, forgiven, or
refinanced during the year?..... [] []
Did you purchase any rental property or acquire an
interest in a partnership or S corporation during 2019? [] []
Did you sell any rental property or an existing interest
in a partnership or S corporation during the year?..... [] []
Did you start a new business during the year?..... [] []

RETIREMENT PLANS

YES NO

Did you receive any money from a pension plan, profit-sharing plan, or IRA during the year?..... [] []

Have you or your spouse established a self-employed retirement plan for which contributions are deductible? [] []

Did you or your spouse set up a Coverdell (educational) IRA during 2019 for anybody?..... [] []

Did you make any contributions to an education savings or 529 Plan account? [] []

Do you or your spouse presently own an IRA?..... [] []

Did you or your spouse withdraw monies from an IRA to purchase a principle residence, pay for education expenses, or to pay medical expenses?..... [] []

OTHER INCOME

Did you receive any Social Security benefits?..... [] []

Did you receive any disability payments this year?..... [] []

Did you receive any alimony or maintenance payments?..... [] []

Did you receive any money from educational savings plans? Attach Form 1099-Q..... [] []

DEDUCTIONS

Did you receive a penalty on early withdrawal of savings? [] []

Did you pay alimony or separate maintenance payments?.... [] []

Did you pay any student loan interest during the year? .. [] []

Did you make any noncash charitable contributions? [] []

Do you have evidence to substantiate charitable contributions? [] []

Did you make gifts of more than \$15,000.00? [] []

Tax law and IRS regulations allow a deduction for expenditures with respect to vehicle expense, travel away, meals and lodging away from home, and certain business gifts only if substantiation of the item can be provided by adequate records or sufficient corroborative evidence. Information that must be available includes:

- Amount
- Time and place of travel or meal
- Date and description of a gift
- Business purpose
- Business relationship to the person

Do you have any substantiation, as previously described, for vehicle, travel and gift expenses to be deducted... [] []

Is this substantiation in the form of written documentation?..... [] []

Did you receive any reimbursement for vehicle, travel and gift expenses from your employer?..... [] []

Did you make any payments in 2019 that would require you to file Form(s) 1099?..... [] []

If "Yes", did you or will you file all required 1099s?... [] []

CREDITS

YES NO

Did you pay for child or dependent care?..... [] []
Did you pay an individual for domestic services performed
in your home?..... [] []
Did you purchase a new hybrid or alternative motor vehicle
during 2019? [] []
Did you pay post-secondary tuition and fees in a degree
or certificate program during 2019?..... [] []
If so, you must attach Form 1098-T. Is 1098-T attached?. [] []
Did you make energy efficient improvements to your main
residence during 2019? [] []

HEALTH CARE COVERAGE

Were you and your dependents covered by minimal essential
health coverage for the entire year?..... [] []
Did you or your dependents receive any Forms 1095-A, 1095-B
or 1095-Cs? If yes, please provide a copy of all forms. [] []

FOREIGN ACCOUNTS AND TRUSTS

Did you have a financial interest in or signature authority
over a foreign financial account during the year?..... [] []
Did you receive a distribution from, or were you the grantor
of, or transferor to, a foreign trust during 2019?..... [] []

I understand that my tax returns will be prepared from information
I provide you through written and verbal communications and that
this information will not be verified or audited.

To the best of my knowledge, the information above is accurate.

Signature of Taxpayer

Signature of Spouse