James F Rogers CPA PA

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Happy New Year !

2018 was a noteworthy year! We have surpassed 30 years in business. We would not have been able to do that without the patronage and loyalty of our many clients. Please know how much we sincerely appreciate your friendship and letting us help with your tax and accounting needs.

Most of the provisions of the Tax Cuts & Jobs Act took effect in 2018, possibly the most complicated and far-reaching change in tax law since the 1986 Tax Reform Act. We have worked hard to keep up with the many changes. Some returns will be simpler this year, some much more complex. We can help wade through the many requirements and look forward to helping with the many new tax planning opportunities.

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 5:15 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 ***Monday 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,

Jim

Jayna

Cathy

THINGS TO BRING LIST

Appointment Date ________________ Time ________________

BE SURE TO BRING ALL OF THE FOLLOWING ITEMS WITH YOU:

_____ 1) All copies of Forms W-2, 1099 and K-1

_____ 2) All Year End Mortgage Loan statements including escrow information. Also Closing Statements if you bought / sold or refinanced your home.

_____ 3) 1099 Forms for Stock and Security Sales during the year including purchase date and cost information

_____ 4) 1099 Forms for Unemployment Compensation, state tax refunds and social security benefits.

_____ 5) 1099 Forms for all retirement fund distributions and transfers

_____ 6) Social Security numbers and birth dates for dependent children (if not already supplied)

_____ 7) Copies of 2 prior year tax returns (for new clients only)

_____ 8) Completed information worksheet or similar information

_____ 9) Schedule summarizing business or rental income and expenses if applicable

_____ 10) Dates and amounts for each estimated tax payment for the current year

_____ 11) Names, addresses and ID or Soc Sec Numbers for <u>all</u> child care providers

_____ 12) Any IRS or state tax correspondence received during the last year

_____ 13) A voided check or copy of a check from your checking account to be used for direct deposit information for electronic filing.

_____ 14) Amazingly, sometimes very obvious changes in your situation get overlooked. Please let us know of any significant changes such as marriage, divorce, sale of your home, new children, winning the lottery, etc.

_____ 15) Please ask questions !! There are no dumb questions, (even though there are dumb answers). We want you to be informed and understand all parts of your tax returns.

JAMES F ROGERS CPA PA 2018
CLIENT WORKSHEET

	TAXPAYER		SPOUSE	
Name	____________		____________	
Soc Sec #	____________		____________	
Occupation	____________		____________	
Birth Date	____________		____________	
Full Year Health Insurance?	Yes ______	No ______	Yes ______	No ______
Best Phone #	____________		____________	
E Mail Address	____________		____________	
Street Address	____________		**Note: Names and SSN's must match**	
City, St, Zip	____________		**Social Security Admin records**	

Dependents:	**Full Name**	**Birth Date**	**Soc Sec #**	**Health Insur Coverage?**
1	____________	____________	____________	Yes No
2	____________	____________	____________	Yes No
3	____________	____________	____________	Yes No
4	____________	____________	____________	Yes No

Estimated Tax Payments:

		---------- FEDERAL ---------		----------- KANSAS --------	
Payment #	Date Due	Date Paid	Amount	Date Paid	Amount
Overpayment from 2017			________		________
1	4/17/18	________	________	________	________
2	6/15/18	________	________	________	________
3	9/17/18	________	________	________	________
4	1/15/19	________	________	________	________

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

Adjustments to Income:	Taxpayer	**Date**	Spouse	**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 -------------		---------------- Dividends Received --------	
From: (Please enclose 1099's)	Amount	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)	
2017 State Tax Paid in 2018	
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 this year

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)