As society changes and as the regulatory environment continues to get more and more complicated, we must also change what we have done in the past. The below steps are proactive, best practices to make sure your return is prepared properly, maximizes tax savings and reduces your audit risk. **This document applies only to individual 1040 tax returns Please pay special attention to the dates below.**

1) Your tax documents must be in to our office by **March 16th** in order to save you unneeded penalties etc.
    a) ***Intake forms are required*** to be completed prior to us starting to work on your individual return.

    b) Intake forms are attached to this email and can also be obtained at www.tedsmithcpa.com under the resources tab
        i) The first page of the intake forms - existing clients - only need to complete if something has changed from prior year - address, contact info, dependents, etc...
        ii) The health care page is very important. The ***IRS 1095 form is required*** to be provided to us to complete your return - this is still in effect for 2017

2) **If tax documents are not provided to us by March 16, 2018, you will need to extend your return**
        i) To extend your return please click here to extend The same link can also be used to extend a business return

3) To e-file returns we must have:
    a) The ***signed e-file authorization form 8879*** - if married filing jointly - signed by both
        i) The 8879 can be e-signed at your portal or manually signed and returned to us
    b) Our preparation fee. Payments can be made at your **portal**
    c) The last day we will e-file returns is April 13, 2018

4) All individual returns will include the Protection Plan service
    a) I have created a solution -- my Worry Free IRS Protection Plan. This service COVERS YOU LIKE A BLANKET and helps shield you from these unexpected costs. The Fee works like an unofficial insurance policy.
    b) This is in addition to your tax preparation fee and you will have the option to opt out.

5) Documentation
    a) Drop offs should include
        i) ***All tax documents needed*** - wait until you believe you have everything. It actually confuses things and slows down the process if you drop off some, but not all information needed.
        ii) Intake forms completed
        iii) Dropping off your tax documents will make the process more efficient for you.
    b) An even more efficient method of you getting us your tax documents is to use your Ted Smith CPA Secure Portal No need to make the trip to the office! Same items are required as listed under drop off.