


PLEASE READ THIS LETTER COMPLETELY.
THERE ARE MANY IMPORTANT DATES AND OTHER INFORMATION YOU NEED TO KNOW!

IMPORTANT DATES FOR THE 2019 TAX SEASON

Monday, March 25, 2019 – We MUST receive ALL of your information to guarantee completion of your 2018 tax return

Saturday, April 13, 2019 – Last Day to electronically file

April 17 - 19, 2019 – Our office will be closed

- ★ **SECURITY** – We take security seriously. Please upload documents to your Secure ATOM Portal, or encrypt any documents you email to us. You can access the secure portal through our webpage.
- ★ **IRS RED FLAG  – CRYPTOCURRENCY** – Please inform us if you are involved in cryptocurrency (e.g. Bitcoin). The IRS is targeting these types of transactions.
- ★ **MISSING DOCUMENTS** – If you have a few missing items, we encourage you to send them in or bring what you have so we can begin preparing your return. Understandably, some items/documentation may be missing initially, however, you may send those in as soon as you receive them. If you are waiting for K-1s, you can still send in your information early. Your return can be prepared while we wait for the pending information. This allows us to send your return to you in the shortest amount of time. We must receive **ALL** of your information by Monday, March 25, 2019 in order to guarantee completion of your return by April 15th. If we receive your information after this deadline, your return may be put on extension.
- ★ **REVIEW YOUR TAX RETURNS** – Please review your tax returns before signing the authorization to e-file. You are responsible for any payments that need to be made. If you owe money, and are not having payments directly debited from your account, please print the vouchers in ATOM from the copy that is attached to the electronic signature forms.
- ★ **DELIVERY OF RETURNS THROUGH ATOM** – All tax returns will be delivered via ATOM for electronic signature this year. Last year, we piloted this program and it worked very well for most of our clients. Everything can be done through the one link. This allows you to electronically sign the e-file Authorization forms. For married filing joint returns, both tax payers must still sign. You will not need to email or fax back the forms using this method, ATOM will automatically notify us when you have signed your documents. Your invoice will also be available for payment through the portal; please pay at the time you sign the documents, as we are not able to e-file for you until your return fee has been paid in full. If you are unable to electronically sign the forms through the portal, please let us know and we have alternative methods for you to sign your forms.
- ★ **ELECTRONIC FILING DEADLINE** – Our e-file Deadline is Saturday, April 13, 2019. We need to assure that your returns have cleared and are accepted by the appropriate government agencies. Our offices will be closed on Wednesday April 17, 2019 and will reopen on Monday, April 22, 2019.
- ★ **ELECTRONIC FILING** – We are required by the Government to electronically file your tax returns. If you choose to paper file your returns (and you are not required to do so), we must have a signed waiver stating that you refused our E-filing services. This service will also incur a \$50 charge since it requires printing and mailing your returns for you. This is also a **very** unsecure way to file your returns.

The IRS has implemented regulations that may affect your tax return,

please be aware of the following:

- * **SALE OF STOCKS OR SECURITIES** – If you have sales of stocks or securities, the recording of the sales and the cost basis of those sales must be recorded individually on the tax return. This process may increase the amount of time it takes to prepare your return. If you have a significant number of transactions that need to be entered on your tax return, our preparation fee may be higher.

- * **UPLOADING YOUR DOCUMENTS TO ATOM** – We are simply not comfortable sharing information via email. *Please* never send information that includes Social Security Numbers, Bank Account Numbers or Birth Dates by email. If you *must* send something by email that includes sensitive information, please encrypt what you send. The US Mail is not a secure method of sending information; mailboxes are frequently broken into during tax time. Your tax documents are secure in our system and only you will have access to them. ATOM is organized by tax year, and your folder will include a Client Copy of your tax return(s) and any documents you uploaded or provided to us in paper form. With ATOM, you will always have access to your information and will no longer have to wonder what you did with your tax returns, W-2s, 1099s, etc. Please call our office and we will help walk you through the process, if you are unsuccessful in accessing the portal. You can easily access your portal through our website (www.asa1040.com), on the top right of the homepage. All of our staff also have a link to the ATOM portal in their email signatures as well. Please contact us if you have any difficulty accessing or using the portal.

- * **DOCUMENT AND UPLOAD INSTRUCTIONS** – Any of your supporting documents can be uploaded to ATOM very easily, if you follow these instructions. Scan your documents and save them to your desktop. Once you have logged into your ATOM Portal, if it is your first time logging in, it will prompt you to change your password. On the left side of the screen, you will see a link for Upload Documents, please click there. You can browse or drag and drop any documents you would like to upload. In the Description Box, please enter a description to name the document you are uploading, this is required. Click UPLOAD. A grey bar will appear towards the top of the page letting you know the document was uploaded. Once you have uploaded all documents, you can click on the VIEW MY DOCUMENTS link on the left side to see all documents you have uploaded. ATOM will alert the office that you have added documents that we need to review. If you provide us with your original documents, they will not be returned to you unless you wish to pick them up; please notify us and we will hold them for you. Otherwise, your documents will only be available in your client portal and the original documents will be shredded by our secure document shredding company. You can email any encrypted documents to taxes@asa1040.com.

- * **FOREIGN BANK ACCOUNTS** – If you have foreign bank or securities accounts, you must inform us. There are severe penalties for failure to report these accounts on your tax return. Please note, the FBAR or FinCEN Form 114 is now due on April 15, the same deadline as your individual tax return; the previous deadline was June 30.

- * **BEFORE WE CAN E-FILE, WE MUST...**
 - o Receive signed e-file forms – all returns will be sent through your ATOM Client Portal, a completely electronic way to sign your E-file forms. Instructions will be included within the link from ATOM.
 - o Receive a signed engagement letter, which can be signed on your ATOM Client Portal or in our office at the time of drop off.
 - o Receive fees for Tax Preparation Services. Payment for services must be received before access to your return is available on your ATOM Client Portal, and/or before your return will be e-filed.

Please call our office if you need to make other arrangements. We sincerely thank you for your business, and we look forward to hearing from you soon.

Sincerely,



Kristy C. Slaton, CPA
ASA Accounting & Tax Services

We invite you to "like us" on Facebook. Please visit our Facebook page for tax season tips of the day – <https://tinyurl.com/y96qtrhf>.

Our website address is: www.asa1040.com

We will scan your original documents into ATOM, where they will be stored. The originals will NOT be returned. If you do not choose to pick up the documents from our office, you must sign the waiver below releasing us from liability when we have your documents shredded with our on-site professional shredding service.

I hereby authorize ASA Accounting & Tax Services to shred my documentations.

Signature

Date