Bennett A. Kogan, CPA
Your trusted accounting & tax solution

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Welcome to Bennett A. Kogan, CPA

2012 Tax Appointment Tips-
What to bring to your CPA

Your annual tax appointment with your CPA is right around the corner...but it doesn't have to rank up there with your dentist appointment (no offense if any dentists are reading this)! Please remember to bring ALL your information to your meeting and if you receive forms after the meeting, send them over ASAP. One missing tax form or piece of information could require the complete redo of your tax return.

Here are some tips on what to bring to your CPA to make the meeting more productive:

1. All Forms **W-2, 1099**, and **1098**.
2. Schedules **K-1** for partnerships, S-corporations, estates, or trusts.
3. If you **acquired or sold stock, or mutual funds** during 2012, bring pertinent information (original purchase date, cost, and quantity).
4. If you **acquired, sold, or refinanced a home** or other **real estate property** in 2012, bring a copy of your closing statement.
5. If you made any **home improvements** that may qualify for the **energy tax credit** (appliances, windows, a/c or heating, etc.), bring a copy of the energy-star certificate and proof of purchase.
6. If you think you have enough **medical expenses** to qualify for this itemized deduction, please bring a breakdown of expense totals by category (co-pays, prescriptions, dental visits, glasses, mileage, long-term care insurance, etc.). If you are unsure if you qualify for this deduction, please contact your CPA.
7. If you had a **child born in 2012**, please provide the child's full name, date of birth, and social security number.
8. Breakdown of total **charitable contributions** (amount and/or value of donation and full name & address of the charity). Please make sure

Featured Article :

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UPCOMING DEADLINES

January 31, 2013:
-Due date for filing fourth quarter Federal and State payroll tax returns.
-Employers: final date to provide W-2's to employees and 1099's to non-employee labor.

March 1, 2013:
-Due date for filing NY form IT-204-LL (Partnership, LLC LLP Filing Fee).

March 15, 2013:
-Due date for filing tax return for 2012 calendar year corporations, including S-corporations.

March 20, 2013:
-Due date for filing quarterly New York sales tax returns.

you have receipts for proof of the donations for your own records, but bring the receipts for the non-cash donations to your tax appointment.

9. If you are a **sole proprietor or own rental property**, provide a summary of income and expenses by category.
10. If you are a **new client**, provide copies of tax returns (Federal & State) for 2010 and 2011, and any notices you may have received from the IRS or state agencies.

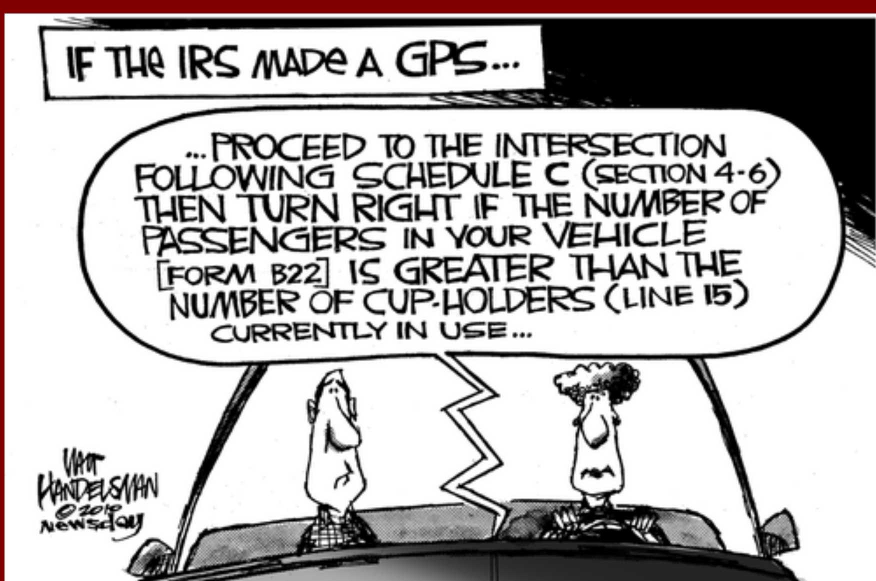
If you haven't had any changes from the prior year, you can do any of the following with your tax information:

- drop it off or mail it
- fax or scan & email the information
- bring it to your personal tax appointment

Please contact me today to schedule your tax appointment.

**REFERRAL DISCOUNT: If you know of any individual or business that does not have a CPA or is unhappy with their current accountant, please give them my contact information or forward on this email. As a reminder, I offer referral discounts to existing clients. For every referral who becomes a client, you can get up to 10% off of your tax bill. So if you are happy with my services, please spread the word.*

Bennett



Cartoon by Walt Handelsman, Newsday

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REFERRAL DISCOUNT

Attention current clients:
Refer a new client and you can get up to 10%* off your bill.

** Referral must become a client of Bennett A. Kogan, CPA.*
Percentage of discount based upon new client's fees.

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