MDM
MEGAN D. MUCCIO, CPA

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IMPORTANT DATES AND INFORMTION FOR THE 2020 TAX SEASON:

Happy New Year! Thank you for choosing Megan D. Muccio, CPA for your tax preparation services. We look forward to working with you this year. We are very excited for this year's tax season and are already preparing for appointments throughout February and March for clients. **In preparation of this year's tax season, we wanted to send you some information and requests ahead of time.**

OUR NAME:

I am extremely excited to announce that as of the 2020 tax season, the Craig James Financial Services Tax Practice will be known as **Megan D. Muccio, CPA**. We have decided that it is important to expand the CPA practice and to do that, will be forming a CPA, PLLC in the 2020 year.

I am excited to continue working out of, and alongside of, the members of the Craig James Financial Services office. All processes will remain the same, except that you will now receive tax emails from Megan@MuccioCPA.com for tax related information. You can also look for my CPA business on its new website, www.MuccioCPA.com.

As always, my focus is working with and educating my clients on their taxes both during tax season and throughout the year and the CPA business' new name will not change that.
Thank you for your continued to support.

APPOINTMENTS:

Appointments are required for all tax preparation and review. If you haven't done so already, please give our office a call to schedule your appointment or email Megan@MuccioCPA.com days and times which work best for you to meet in person or by phone. Weekend and night appointments are available on a more limited basis. Please schedule early to avoid disappointment.

Upon scheduling, you will receive an email back with a confirmed date and time for your 2020 tax preparation appointment. You will receive a second email 1-2 weeks before your appointment and a phone call the day before confirming your meeting / call. We ask that you please try to retain your scheduled appointment time as it may be difficult to reschedule your appointment at a time that is convenient for you.

ENGAGEMENT LETTER AND ORGANIZER INFORMATION:

With your confirmation email, you will receive both an **Engagement Letter** and a **Tax Organizer.** Please sign, complete the tax organizer, and return all documents to our office with your tax forms by 2 weeks prior to your appointment.

For current clients, please review the prepopulated organizer and make any necessary changes to your personal information. If the information is all correct, please check the box on the organizer stating, "The information above is accurate". The "Additional Questions" section must be completed for each tax year, even if the answers remain the same.

TIMELY SUBMISSION OF DOCUMENTS:

Starting the 2020 tax season, we are now requiring documents be provided to our office **2 weeks prior** to your scheduled appointment. Documents can be **mailed, emailed or dropped off in our office**. This will allow us to prepare a draft of your return and send a follow-up email with missing documents and / or follow-up questions. We understand that a few items may still be outstanding and we will finalize your return after those documents come in, or during your scheduled meeting.

MISSING DOCUMENTS:

Even if you have a few missing items, we encourage you to send / bring in what you have so we can begin preparing your return. Understandably, some documentation may be missing initially, however you may send those in once received. Please provide us with the following supporting documentation:

- All tax documents, as detailed on page 2 of your tax organizer
- Listing of estimated payments that you made during the year
- Any notices received from the IRS or other taxing authorities

TAX PREPARATION COMPLETION:

Unless otherwise discussed, your tax return will be completed during your in-office meeting. Upon completion, please **take the time to review your tax return**, either with Megan, or on your own. If you are satisfied with your return, the following is required:

- You, and your spouse if applicable, are responsible for signing the E-File Authorization form
- **If a balance is due**, decide if you would like to pay it by check or as an automatic withdrawal from your account on a date of your choosing
- **If a refund is to be received,** decide if you would like to receive it by check or as an automatic deposit into your account
- **For automatic withdrawal / deposit, a voided check will be required**
- **For payment of a balance due by check, vouchers will be provided**

BEFORE E-FILING:

Our office requires the following items to be in our possession before we can e-file your return:

1) **Signed Engagement Letter**
2) **Signed E-File Authorization Forms** (Federal and all required states)
3) **Our fees for tax preparation services** (Payments are to be made by check payable to Megan D. Muccio, CPA or via Debit or Credit Card)

OUR ELECTRONIC FILING DEADLINE:

Please note that we are required by the government to electronically file your tax returns. Our **deadline is Tuesday, April 14, 2020.** We need to assure that your returns have cleared and are accepted by the appropriate government agencies.

OTHER STUFF:

Please remember if you are waiting for K-1s, you can still make your appointment or send in your information early. Your return can be prepared while we wait for pending information. This allows us to finalize your return in the shortest amount of time. Returns will not be e-filed after Tuesday, April 14, 2020. There is not enough time after this deadline to guarantee on-time acceptance of your returns by the government agencies. An extension can be filed on your behalf if your documents will not be available.

If you have foreign bank accounts, you must inform us if you hold any type of foreign assets, including bank or securities accounts. 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.

Please call our office if you need to make other arrangements (631) 393-2888.

I sincerely thank you for your business and look forward to hearing from you soon. Wishing you and your family health, happiness, and peace in 2020.

Sincerely,

Megan D Muccio

Megan D. Muccio, CPA
Certified Financial Fiduciary®
Megan@MuccioCPA.com

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