



Circle Tax & Accounting

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6324 N Chatham Ave #206
Kansas City, MO 64151
January 10, 2019

Dear Circle Tax Family,

I hope you got 2018 wrapped up and you're ready to start 2019. Tax season is just around the corner. As you know there were some substantial changes made to the tax laws at the end of 2017 which means the 2018 tax forms will be very different. Although you may have heard that this was supposed to simplify the tax filings there are now even more tax forms that need to be filed even for simple returns. They have gotten rid of the 1040-EZ and 1040-A. So, everyone will file a 1040 this year. They have taken the 1040 that we have had for years and changed it to multiple schedules for income, deductions, credits, and taxes. Because of these changes I want to be up front with changes to my fees. I have always billed based on the forms that need to be filed. I will continue to do things that way. Because everyone now files a 1040, my starting rates will be \$125 this year. Then I will charge based on additional forms as necessary. As always, my fees include federal, MO, KS, and KCMO. I will have the full list on my website or if you would like a price before we prepare your return please let us know. If you have states other than MO or KS the fees for those states will vary between \$35-\$55 depending on the state.

The biggest simplification was the change in the standard deduction which will now mean less people will itemize deductions (schedule A). The new standard deduction is \$12,000 for single filing status, \$18,000 for head of household, and \$24,000 for married filing joint. If you have itemized in the past you can check your prior year return line 40. If the prior year amount was not over the amounts listed above you will most likely not itemize. There are still deductions such as educator expenses, student loan interest, IRA contributions, etc. Please feel free to provide us with all the information you have in the past and if we don't need it we will let you know for future returns.

In addition to the tax law changes my work situation has also changed again this year. I will no longer be able to meet clients at the church I used last year. Thus, I will not be scheduling any in person appointments this year. I will still have the drop box at 1713 Westport Road and you can always mail your documents if you are not able to upload them electronically. Because I know many people would prefer in person appointments, I am also working with another local tax preparer if you would prefer in person relationship:

Chris Sullivan
Bellwether Tax & Accounting
913-440-4187 (office)
913-205-4276 (cell)
Email: info@bellwethertax.com

I have worked with Chris over the years and know his pricing is reasonable like mine. He has been doing taxes for many years and can handle all tax returns. We would be happy to send prior year information over to Chris if you would prefer to meet with him or his staff. Just let us know and we can add him to your sharefile so he will have prior year information.

The best way to contact us during tax season is by calling our main number at 816-753-1700 or by sending an email to questions@circletax.com. Please use this email address as it is monitored by me and my staff members, so emails do not get lost. Also, in the past I have had a number available for text messaging, because of the large number of messages I received during tax season I can no longer monitor that account so please do not text questions.

With all the uncertainty this year with the new tax laws I am setting a March 15th deadline for receiving documents if you want your return done by April 15th (and as of now the deadline is in fact April 15th this year). I understand that sometimes investment documents are not received until March 15th. If you do not have all your documents, please provide us with what you do have as early as possible and let us know you are still waiting. It is much easier to add one document then to do an entire return so the earlier the better.

Finally, while we appreciate you telling your friends about us because of all the changes this year we will not be taking on new clients. This may change in the future and it may not. If you would like to provide someone with information for a qualified small business tax preparer please give them Chris' information. He is a small business owner who can provide more personalized service than the big corporate companies.

Sincerely,

Aimee L Sanita

Aimee L Sanita, EA

P.S. I will continue to do the MO Property Tax credit returns for \$35.