

Circle Tax & Accounting  
6324 N Chatham Ave Ste 206  
Kansas City, MO 64151

Dear Circle Tax Family,

I hope you all enjoyed some time with family and friends this holiday season. Of course, tax season is just around the corner and I wanted to let everyone know that Circle Tax has made some major changes in the last couple months. After 13 years in the same location Circle Tax has given up it's Westport location to work from home. As my family has grown my children are requiring more time and the best way to do that was to work from home. What this means to my clients is that I will not have hour long appointments to prepare your tax return as I have in the past. I have made arrangements with Our Saviour Lutheran Church at 43<sup>rd</sup> & Rainbow (4153 Rainbow Blvd) to use some space to meet with clients for short appointments (this will not be to prepare the full return as I will not be set up to complete returns there.) We will be scheduling 15-minute appointments to briefly discuss documents and completed returns. We will have times available mostly on Wednesdays. I will also be scheduling phone appointments to go through documents or to discuss finished returns. We will not have an option to schedule appointments online this year, if you'd like an appointment you can call us at 816-753-1700 or email [receptionist@circletax.com](mailto:receptionist@circletax.com).

We will have several options for getting documents to us.

1. We have a drop box at Doggie Style Bowtique located just a few doors down from our old office (1713 Westport Road, Kansas City, MO 64111). The hours are generally Tuesday-Saturday from 8-4. If you want to confirm they are open before heading over to drop off information please call her at 816-561-3647. She can't answer any questions regarding your taxes. I also suggest if there are days of inclement weather you call as she may be closed if a lot of the city is closed. There will be envelopes there to put all your documents in. There will also be info sheets if you need to provide new contact information. **Please make sure your name and phone number are on the envelope.**
2. If you prefer to mail your information, you can mail your information to 6324 N Chatham Ave Ste 206, Kansas City, MO 64151. Please note this is a UPS Store PO box, this is not my new office, so you cannot just drop stuff off at this location. You can send stuff via any mail service—USPS, UPS, FedEx, etc.
3. You can load information into sharefile at <https://circletax.sharefile.com>. If you don't currently have a login please let us know and we'll get you set up. Please load information into the folder labelled "**Put Your Documents Here.**" That will ensure we get notified when you load your documents. You might also email [receptionist@circletax.com](mailto:receptionist@circletax.com) to make sure we are aware that it was uploaded.

Our contact information has remained the same. You can still call our office at 816-753-1700. In addition, we still have the same email addresses. **Please note that I get hundreds of emails every week. If you have general questions you will get a much quicker response by sending it to [receptionist@circletax.com](mailto:receptionist@circletax.com).** During tax season I generally try to respond within 2 business days. Please do not email your documents directly to my email. I've had more and more emails with attachments

end up in my spam folder. In addition, the sharefile is a much more secure way to send these sensitive documents.

In addition to these changes we have cut our staff back, so please make sure you get us your information as quickly as possible this year. Here are a few important deadlines:

- **January 31, 2018--** W-2s & 1099s need to be issued by the end of January. If you are waiting on documents companies need to have them mailed out by January 31<sup>st</sup>. Please allow a few days for them to arrive in your mail. In addition, remember that if you had health insurance through the marketplace we must have the document to file your return. If you have it through an employer it is helpful to have the 1095-B but not required.
- **February 28, 2018—**
  - Kansas City Business Licenses are due February 28<sup>th</sup>. Please contact us if you need assistance filing.
  - Missouri Personal Property Tax Declarations are also due. If you have moved to a new county make sure you let the old county know you moved and also notify the new county of your property.
  - Missouri Business Property Tax Declarations are also due. Please make sure to get us your information as we need the PIN in order to file it online. We also need to know if you got rid of or acquired new equipment in 2017.
- **March 15, 2018--** Remember S-Corp and Partnership returns are due March 15<sup>th</sup>, so if you file a separate return for your business I need information by the end of February. Extension go until September 17, 2018
- **April 17, 2018--** The individual filing deadline is April 17, 2018. If I have all your information by *March 25, 2018*, we will get the return done by the deadline (and we will do our best to get those dropped off after that deadline done as well but will not guarantee it). Extension are good until October 15, 2018. However, if you anticipate you will owe taxes you need to have that paid by April to avoid penalties.

We look forward to working with you. Please visit our website for additional documents and information.

Thank You,

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