



Pacific Tax

Income Tax & Financial Services
PacificTaxService.com

7000 15th Ave NW
Seattle, WA 98117

January 2019

Dear Client,

It's time to start thinking about filing your 2018 tax returns! I look forward to creating strategic tax plans on your behalf to maximize tax savings in the most timely, fair and secure way.

The due date for filing your 2018 return is **Monday, April 15, 2019**, please be sure to book your appt with plenty of time to process.

I am now accepting online appointment bookings at www.pacifictaxservice.com/kurt . Please review the attached guide which will help you prepare the required tax documents prior to your appointment. If you are unable to meet in person this year, I am equipped to securely receive your scanned tax documents and meet by appointment over the phone.

Appointments can be made at either:

The Ballard office: Monday-Thursday and Saturdays

OR

West Seattle on Fridays and Sundays.

Hours vary and are posted on the website for each location.

Please take care to book at your desired location!

To a wonderful 2019!

Sincerely,

Kurt P Romischer

Kurt Romischer



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INCOME

Wages

Forms may include:

- ✓ W-2
- ✓ K-1 (Partnership, Trusts, S-Corps)
- ✓ Alimony Received
- ✓ W-2G (Gambling/Winnings)
- ✓ 1099-MISC (Prizes/Awards/Tribal)
- ✓ 1099R (Retirement Payments)

Interest Earned

Forms may include:

- ✓ 1099-INT
- ✓ 1099-B

Dividends

Forms may include:

- ✓ 1099-DIV (from the Investment Co.)

Unemployment

Forms may include:

- ✓ 1099-G (from the State or Railroad)

Social Security

Forms may include:

- ✓ 1099-SSA
- ✓ 1099-RRB

IRA Distributions

Forms may include:

- ✓ 1099-R (from the Investment Co.)
- ✓ You'll need original cost basis amounts

Pensions

Forms may include:

- ✓ 1099-R (Retirement)
- ✓ 401K Statement

Business Income

Forms may include:

- ✓ 1099-MISC (Non-employee Compensation/Self-employment)

Sales of Stock

Forms may include:

- ✓ 1099-B (FINALIZED Stock Trade Transaction Statement)

Other Large Capital Sales

Forms may include:

- ✓ 1099-S (Example: House or Land)

DEDUCTIONS

Medical & Dental

- ✓ Affordable Care Act 1095 B or C
- ✓ Prescription Drugs
- ✓ Medical Insurance (paid by you)
- ✓ Doctors, Dentists, and Hospitals
- ✓ Medical Transportation (23.5 cents per mile)

Other Medical Expenses

- ✓ Glasses, Dentures, Hearing Aids, Misc.

Taxes

- ✓ State Income Taxes
- ✓ Real Estate

Sales Tax

- ✓ Boat, Car, Home Improvements

Auto

- ✓ RTA Excise

Mortgage Interest Paid Out

Rental Property

- ✓ Statement from Property Management Co. or total of all deposits in rental bank accounts
- ✓ Main Home
- ✓ Second Home
- ✓ 2nd Mortgage
- ✓ Equity Loans

Office in Home (Small Biz)

- ✓ Sq. Ft. of Office
- ✓ Sq. Ft. of Home
- ✓ Home Insurance
- ✓ Home Repairs & Maintenance
- ✓ Utilities (electric, gas, water, etc.)

Home Cost (Property Tax Assessment)

- ✓ Land
- ✓ Building

Charitable Contributions

- ✓ Cash contributions (qualified written statement per charity of \$250 or more)
- ✓ Charitable miles (qualified log of miles driven related to volunteer work)
- ✓ Non-cash contributions (list of items donated to qualifying charities of \$500 or more)

OTHER DEDUCTIONS

- ✓ Casualty Loss (In a Federal Disaster Area)
- ✓ Gambling Losses

ADJUSTMENTS

- ✓ IRA's & SEP's (original contribution)
- ✓ Student Loan Interest
- ✓ Dependent's College Education Tuition (1098-T)

CREDITS

- ✓ Home Energy Improvements
- ✓ Child Care Expenses
- ✓ Solar Energy Credits

PAYMENTS

- ✓ Estimated Tax Payments
- ✓ State Sales or B&O Taxes

ADDITIONAL REQUIRED INFORMATION

- ✓ SSN & Birth Date for each person listed on the 2018 Tax Return
- ✓ For New Clients, please provide a copy of your 2017 Tax Return
- ✓ For Direct Deposit of your refund, you will also need:
 - Name of Bank
 - Routing Number (9-digits)
 - Account Number

Secure Document Upload / Download

pacifictaxws.securefilepro.com

(New clients email for activation)