

DECEMBER 2014

YOUR TENTATIVE TAX APPOINTMENT IS:

DATE: _____ TIME: _____ A.M. P.M. PLACE: _____
PREPARER: _____ Kari Pel, EA, CFP _____ Paul McReynolds EA

The Above Appointment is TENTATIVE- Please Contact Our Office to Confirm Your Tax Appointment.

If the above appointment regarding time, date, place and/or preparer is unsatisfactory, please contact us as soon as possible to reschedule. For your convenience, a list of the 'satellite locations' where we will be conducting tax interviews outside of the Seal Beach office has been provided on the back. To reschedule please call the office at (714)526-2668 or email us at admin@pelandassociates.com.

Appointments fill up quickly, so call early to reserve your spot!

Information you MUST read!

ALL clients MUST read and sign the Engagement Letter PRIOR to the tax return being completed. It is included in this mailing. Please bring it signed to your appointment. The Consent to Use Form on the reverse is not required for tax preparation, but will allow us to reference your tax return for financial planning purposes, if applicable.

ALL clients MUST fill out the portion of the organizer that contains your name, occupation, phone numbers, address, and e-mail address, at a minimum. *Completion of the entire organizer and checklist is appreciated and highly recommended. It is important that this organizer is signed and is in the files for future reference.*

ALL clients MUST answer the questions and sign the enclosed questionnaire.

There will be an **ADDITIONAL CHARGE OF \$25** for all tax appointments scheduled on or after **April 1**. Please call early to make your appointment.

"CORRESPONDENCE" CLIENTS: There will be an **ADDITIONAL CHARGE OF \$25** if your initial transmission of information to us is dated or postmarked after March 15 and \$50 if the initial submission is after **April 1**. If some of your information will be available by these deadlines, please send us any information that you may have so that we can begin working on your tax return. We will **NOT** charge extra for additional information that we request after March 15.

**** IMPORTANT ** SECURE MAILING ADDRESS: P.O. Box 400, Los Alamitos, CA 90720**

As an added benefit to our clients, we have acquired the above P.O. Box to use when mailing sensitive information.

Information may also be faxed to 866-279-4916 or e-mailed to admin@pelandassociates.com

OUR SERVICES. At Pel & Associates, we do much more than just prepare your tax return! We are equipped to assist you in a variety of different areas:

- Audit Representation
 - Correspondence with IRS & State Agencies
 - Extensive Tax Planning
 - Payroll Services & Form W-2/1099 Preparation
 - Bookkeeping Services
- Kari L. Pel, EA, CFP® is a certified financial Planner™ professional and a registered representative offering Securities and Advisory Services through United Planners Financial Services of America, including:
- o Life Insurance Planning
 - o Retirement and Investment Planning
 - o Individual and Group Medical Insurance, and more!

Client Portal Delivery of Tax Returns! ! Our default method of delivering tax returns has changed and will now be sent via Client Portal, aka "Cloud Cabinet". If you do not already have a login and password, information will be e-mailed to you after your tax preparation interview. Once logged in you will have access to your Tax Return and Source Documents for 2014 and the three previous years, if your return was prepared by this firm. A copy of your Tax Return will be mailed to you at NO EXTRA CHARGE upon request. Any Tax Returns required to be filed by mail will also be mailed at no extra charge.

NEW EXTENSION FILING PROCESS. Need to file an extension? We will require all clients to sign an Extension Agreement and pay a \$25 deposit. THIS IS NOT AN ADDITIONAL FEE. All \$25 deposits will be applied to the tax preparation bill once the tax return has been completed.

SEAL BEACH LOCATION REMINDER: Our office is located in Seal Beach, CA off of Seal Beach Blvd, where the 405 meets the 605 freeway, close to Los Alamitos and Rossmoor, in the Bixby Office Park. There is elevator access to the 3rd floor.

Parking. Visitors are able to park in any unmarked parking space, or in a space marked "Visitor".

Evening and Weekend Appointments. The lobby doors and elevators lock at 6pm on weeknights and at 1pm on Saturdays. If your Seal Beach appointment is after these times, please prepare to call the office when you arrive. We will come down and assist you.

Pel & Associates Facebook. Pel & Associates has a Facebook page! You can expect frequent updates on deadlines and other important announcements from our office. Be sure to like Pel & Associates on Facebook!

Pel & Associates "Care Plan". Please read the enclosed flyer regarding the Pel & Associates "Care Plan". Contact our office for more information.

Please make note: The IRS Standard Mileage rates for 2015: Unavailable at the time of printing. Check our website for updates.

Detailed Organizers are Available Upon Request. If you would like to receive a more detailed organizer that lists last year's information alongside space to enter in this year's information, please call or e-mail the office. We will get one out to you right away.

DMV Fees. Remember, only the license fee, based on the value of the vehicle, is deductible on your

tax return. For California vehicles, the deductible portion is listed on the bill as "License Fee" with the verbiage, "This may be a tax deduction" next to it. Please have this information available at your tax appointment. You can also check out the DMV website at www.dmv.ca.gov for more information.

Medicare Premiums. In the medical section of the 2014 Tax Organizer, please indicate whether or not you have included your Medicare premiums as part of your insurance premiums. We want to make sure we are not duplicating this information as it is reported on your Social Security Statement (Form 1099-SSA).

State Estimated Payment. If you had a large increase in income during 2014, it might be wise to make your state tax payment before December 31, 2014. The amount may be deductible on your federal return as an itemized deduction. (Sorry, the federal tax payments are not deductible on the state return). To verify that a pre-payment of State income tax would be of benefit to you, please call the office.

SPECIAL NOTE FOR MINISTERS: Establishing your 2015 Housing allowance. Remember, your housing allowance should be established each year and in advance. This firm recommends that you establish your 2015 housing allowance in December. If you have any questions, or would like some guidance in this area, please give us a call.

We Have Room For New Clients And Appreciate Your Referrals. Your confidence in us means everything. If you know of someone seeking tax or financial advice, please pass along our number. A good referral is the best compliment.

Tax Interview Dates and Cities ("Satellite" Locations): Satellite locations have limited availability. Please call soon to reserve your appointment or to be put on a waiting list for your desired date.

Alta Loma- March 3 (Tues)

Beaumont- February 21 (Sat)

Chino- March 5 (Thurs)

Corona- February 7 (Sat)

Dana Point (new)- February 12 (Thurs)

El Toro- February 24 (Tues)

Hemet- Feb 10 (Tues)

Moreno Valley- January 31 (Sat)

Pilgrim Place Homes

(For Pilgrim Place Residents ONLY) -

February 18 (Wed), February 26 (Thurs),

March 4 (Wed), March 18 (Wed),

March 26 (Thurs)

Rancho Cucamonga- February 17 (Tues),

March 19 (Thurs)

Riverside- March 7 (Sat)

San Dimas- February 19 (Thurs)

Tujunga- March 17 (Tues)

Victorville- March 12 (Thurs)

BEST WISHES FOR A HAPPY NEW YEAR!!

The Pel & Associates Team,

Kari L. Pel, EA, CFP®

Dr. Paul McReynolds, EA

Alice Pacey

Jeni McMasters

Daun Slauson

Sharon Keys