Catamount Accounting & Tax Services, ***PLLC***

January 4, 2018

Dear Client,

Happy New Year to you and your family. Wow, so much has happened on the tax front and I am sure you will have questions on the new tax laws for 2018. I will be getting my feet under me as soon as I can and will be consulting and advising you regarding 2018 during this tax season. As for 2017 not much has changed so while you are gathering your tax information please remember to identify and include the following, if applicable:

- If there was a new addition to the family in 2017 please provide the child's full name, social security number and date of birth.
- The cost basis for all stocks and/or mutual funds sold in 2017. I will be happy to assist you with this if needed.
- All W-2's (Wage Statements), 1099's (Interest & Dividends, Broker Proceeds, Misc. Income, Non-Employee Compensation, etc.), 1098's (Mortgage Interest Statements), Social Security and Stock/Mutual fund statements for all financial activities during 2017.
- Closing (HUD) statements for any property you bought or sold including refinancing of any mortgages.
- All K-1 information received from Partnerships, S-Corporations, Estates and Trusts.
- Business and rental income and expense breakdowns by category. Also, any new assets purchased or sold.
- Dates and amounts for all 2017 federal and state estimated taxes paid from January 1, 2017 through January 15, 2018.
- Copy of your 2017 - 2018 property tax bill and, if available, a statement of property tax paid in 2017 from the town clerk.
- Name, address, amount paid, and tax identification number (social security or Federal ID) for any child care providers utilized in 2017.
- Itemization of all non-reimbursed employee business expenses.
- Listing of cash and non-cash contributions/donations to charity. Please ensure you have receipts for all cash and non-cash donations and cancelled check or credit card statements, if applicable.
- Voided check or savings account information if you want to elect direct deposit of any potential refunds or pay any balances due.
- Last pay stub for the year for each company you worked for in 2017.

- Listing of all out of pocket medical, dental and prescription expenses not covered by insurance.
- Affordable Care Act reporting documents. Please include information on health insurance coverage for 2017 and for 2018 for you and your family if you have or had coverage. This could be forms 1095-A, B, and or C.
- Any tuition statements and student loan documents for colleges and universities attended by you or your children.
- Finally, I will need a copy of your driver's license or the following information as part of the federal and state fraud prevention initiatives; Issuing State, License Number, Issue Date and Expiration Date.

I would like to receive your complete 2017 tax data package no later than Monday, April 2, 2018 which should allow me to get the return(s) prepared by the April 16th deadline. Any tax information received after that date might require that an extension of time be filed for your federal and state tax returns. If an extension of time is required, any tax that may be due with your return(s) must be paid in advance with that extension. Any taxes not paid by the original filing deadline are subject to late payment penalties and interest when those taxes are subsequently filed and paid.

Take care and I hope to hear from you in the near future with any questions/concerns or when your 2017 tax information is together and your returns are ready to be prepared. My email address is rsinkewicz@gmcsusa.com. As in the past I will be placing a 2017 tax organizer on my website at www.catamountaccounting.com should you wish to use this as a guide in gathering your tax data. Finally, feel free to refer my name to anyone you know who might be looking for tax and accounting services.

Sincerely,

Robert W. Sinkewicz, CPA