Dear Valued Client,

We are enclosing an income tax data organizer designed to help you gather the information needed to prepare your 2018 personal income tax return. Please complete only the pages that apply to you. Please do not transfer information found in tax forms to this organizer, if a form is provided we will obtain the information from the form directly.

A list of tax forms you may need to provide is included with this organizer.

Because of the new tax law's expansion of the standard deduction (almost twice as much as last year), it may be more beneficial for you to take the standard deduction rather than itemize. However, if you itemized last year and are not sure which deduction is larger, please provide the same type of information you provided last year so we can make that determination. Note that Colorado provide a charitable deduction even if taking the standard deduction on the federal return, so please complete the Charitable Contribution form if your total contributions exceed $500.

Important note: In addition, the tax law created a valuable new deduction for owners of sole proprietorships and owners of qualifying rental properties and farms. In general, the deduction is equal to 20% of net income, subject to some limits and hurdles. It may make sense to extend your return or returns where there is uncertainty about how the new deduction applies. If that is the case, we will make that recommendation and provide assistance with the extension.

Please return all of the following items to us:

1. Signed engagement letter (will be sent to you directly)
2. 2018 tax forms (e.g. W-2, 1099)
3. 2018 Tax Questionnaire (required) and 2018 tax organizer (only pages that apply)

You can provide these forms to us in three ways. Choose the method that is most convenient for you:

1. Drop them off at our front desk. We will return them to you when your return is completed.
2. Scan the forms as PDFs and upload them to your secure online portal. You may scan all forms into one PDF and label it "[Name] tax forms"
3. Mail them to our Louisville office. We will return them to you when your tax return is completed.

The filing deadline for your income tax return is April 15, 2019**. In order to meet this filing deadline your completed tax organizer and supporting documents need to be received no later than March 10, 2019**. Any information received after that date may require that an extension be filed for your return. While we always encourage you to submit as much information together as possible, it is not necessary to hold up your tax document submission for one delinquent form.

If an extension of time is required, any tax due must be paid by April 15, 2019, or the balance will be subject to penalties and interest. We will prepare extension payments, if needed, based on information provided by you at the time. Additional fees may apply.

287 Century Circle, Suite 200, Louisville, CO 80027
BY APPOINTMENT ONLY - 4770 Baseline Road, Suite 200, Boulder, CO 80303
www.flewellingcpa.com · 303.499.7445 · 303.967.2373 (fax)

A list of the forms available for download on our website is provided below:

Individual Forms	**Who should you use this form:**
2018 Personal Tax Return Engagement Letter	Required for all individual clients
2018 Client Questionnaire	Required for all clients
Tax Form Checklist (optional – for your reference)	A comprehensive list of tax forms and other items relevant to 2018 personal tax returns (e.g. W-2s)
Personal Information Updates	Appropriate for clients who have changed contact information (phone, email, address, etc.), their bank account, or have changes to make to their dependents.
Schedule C – Small Business	Appropriate for clients with a Schedule C business (sole proprietorship)
Schedule E - Rental	Appropriate for clients with a Schedule E rental property
Home Office	Appropriate for clients with a home office
Business Auto Expense	Appropriate for clients deducting non-reimbursed auto expenses
Charitable Contribution	Appropriate for clients who made charitable contributions
Medical Expenses Deduction	Appropriate for clients with unreimbursed out-of-pocket medical expenses that will likely total over 7.5% of adjusted gross income
Estimated Tax Payments	Appropriate for clients who made 2018 federal and/or state estimated tax payments
IRA, HSA and 529 contributions	Appropriate for clients who made 2018 contributions to a retirement, health savings or college savings account
Other Information	Appropriate for clients who have notes, questions for their tax preparer, or have other information to provide that was not reported on tax documents
Use Tax Information	Appropriate for clients who made purchases online in 2018 for which they did not pay Colorado state sales tax
Lite Organizer	All of the above forms in one document.

Thank you for the opportunity to serve you. Should you have questions regarding any items, please do not hesitate to contact us.

Sincerely,
Flewelling & Mitton, PC