

Winter 2009

Winter Florida Trip...

An opportunity to fly to Florida for a business meeting became a lovely birthday, early holiday surprise for Marsha's brother. Details of the exact location where her brother moved last October were discussed, at length, in relationship to Ft. Lauderdale where the business meeting was to be held. Then came the surprise... Reid and Sierra will get a visit at their new residence, a big old class C motor home, just driven from WI to Orange City, FL. The visit was fantastic; celebrating Marsha's birthday with a campfire, roasted marshmallows included! Yummy! Sierra's son, daughter and grandkids live nearby. It had been 8 years since Sierra moved to WI so there is a lot of reunion fun going on. While driving from Orlando area to Ft. Lauderdale the bright FL sun is shining in the sunroof – ahh, John's favorite love; warm sunshine while driving. Although this was a short trip, it was splendid with the opportunity to see Reid and Sierra as well as John attending the business meeting.



The Completion of the Holidays

All of us are sighing upon the completion of yet another Holiday

Season. Now we are left to just put away all of the wrapping paper and ribbons along with the many decorations of reindeer, Santa & the helping elves to begin a long winter. Will we get snow to shovel or plow or maybe we jump right to begin thinking about maybe having a March picnic with hopes of a warm winter.

Indeed, we are right at the beginning of the Tax Season. We do look forward to catching up with all of you since our last visits. We work hard to stay in contact with each of you during the year. Please always feel free to give us a call with your questions.

We invite each of our clients to give the office a call to reserve your appointment time and date for bringing in your 2008 Tax information. As you know, we spend a few minutes reviewing the information that you have brought in, making sure that we are also aware of any changes that may have taken place during the past year. By calling to set up an appointment, you receive a date and time that fits into your schedule plus you are alleviating the need to wait more than a few moments since we will be expecting your arrival. A reminder list will share many of the items that our clients require for tax preparation. The list does encompass a wide variety of items, some you may

not pertain to all clients. We will be waiting for your calls to set up your tax appointments. Note we are scheduling appointments now for the entire season.

Reminder list to bring in with you for your Tax appointment

- W2's
- 1099's
- Earned Interest (from Banks, Investments & CD's, Dividend Income (Mutual Funds)
- Child Care (Mostly a Pre-School or Daycare situation) Need Federal Tax ID #.
- Contributions; Church, Salvation Army, Big Sisters, other donations (Cash or non-cash, etc.)
- Capital Gains (Stock purchases or sales, Mutual Funds, Sale of House or Condo)
- Rental Property
- Investment Income: Bring the END of year statement.
- Employee Non-Reimbursed Business Expenses (Union Dues, Uniforms, Boots/Shoes, Mileage, Classes etc.
- Tuition (paid out of pocket or on Loan), What year of College, Name of Student, Degree program?
- Self-Employment
- Other Itemized deductions: Medical, Mortgage Interest, Car Property Tax, Real Estate Taxes, Re-Finance closing papers, Lottery / Gambling winnings or losses. Tax Preparation, Safe Deposit Box fee. *Note: If you do not Itemize on your return, you may deduct the Property Taxes you pay for your home.*

We Are in a State of Change!!

Just a few of the current changes to expect for 2009

- Some significant tax changes for the 2008 tax year are already passed into law.
- Potential tax changes to be brought in by the new Obama Administration.
- Some 2009 tax changes that have already happened, such as no RMD (required minimum distribution) at age 70 for 2009

We Appreciate You

During the tax season we will again have a Weekly Drawing for our Returning Clients. When you bring in your tax information, we will enter your name into that weeks drawing. The drawing is held on Fridays, each week the winner will receive 2 tickets to the Show Case Cinema.

We also encourage you to continue to refer your friends and relatives to our office. Our Referral drawing program has been successful and will continue. Look for the three gifts when you come in for your appointment. This drawing will be held on April 15, 2009.



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