# Investors Tax Service
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**Happy New Year!**

We are in year two of the 7 year tax bill (***TCJA – Tax Cuts and Jobs Act***). Many taxpayers are dealing with shrinking refunds and/or owing the IRS for the first time in their tax filing lifetime. We discovered last year that although many clients have had their tax bill reduced due to the new law, their refund shrunk. This was due to the IRS withholding tables changing by more than the expected tax savings. We have learned much about the new law and continue to watch the IRS address issues that have been created from the new law.

If you are looking for "**news**" about the new laws and pertinent issues check out our monthly newsletter on our website. https://www.investorstax.com/monthly-news

If you are looking for a copy of the **"2019 Simple Checklist", "2019 Year End Letter" or *NEW* "2019 Blank Organizer"** you can find a link to a PDF copy which you can print from any page on our website. www.investorstax.com

If you booked an appointment during last year's appointment you should have received the pink card as a reminder. If you did not receive a card it is likely you do not have appointment. If you need an appointment call the office to see if we can find a spot. Jim's calendar is pretty full so we suggest you take advantage of our **drop off service** or the **Online Client Web Organizer** to submit your information to us.

We will be posting the **2019 "Client Web Organizer"** to your portal shortly. If we have your current e-mail address you will receive an email notifying you that it is ready. The organizer is comprehensive and you will have the ability to complete it online and upload your documents. **We do not require you to complete the organizer** but at the very least please update our office with your current contact information.

If you do not use the "Client Web Organizer" you can always upload your documents into your **portal** using "File Exchange" from within the portal. Login to your portal here https://www.investorstax.com/client-login . If you have not previously registered for the portal call the office and we will send you an invitation to access it. Using the portal to provide us documents is much more **secure** than e-mail. If you are using the Online Organizer be sure to attach all of the documents **before** "Sending to Preparer". The best format for us to work with your documents is PDF.

Fees for the preparation of your tax return **is due upon completion of your return**. **No tax return may leave our office without your payment** with NO exceptions, unless you have made arrangements prior to your tax preparation. For your convenience we accept cash, checks, EFT, VISA, Mastercard and Discover. Please understand that we charge a $40 fee for any returned checks. We also charge a "Re-run" fee of $75 for any client changes after returns have been calculated and printed.

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