

Murphy Financial Services, Inc

5911 W Vliet Street
Milwaukee, WI 53208
sharon@murphyea.com
Phone: (414)453-8655 | Fax: (414)453-6396

January 25, 2018

:

Enclosed is your 2017 organizer. Certain lines in the packet contain information from last year's return. You do not need to change the dollar amounts from last year; these figures are provided for reference only.

Please review the entire packet and answer any questions that apply. When you are finished, you can either drop off your information at our office, email or mail it to us, fax it to us, or call our office if you feel you need an appointment. We also offer a pickup service for an additional fee. Please return to us your signed engagement letter, your organizer, all W-2s, 1099s, K-1s, real estate tax bills, mortgage interest statements and any other tax related documents.

Effective January 1, 2014, unless otherwise exempt, all U.S. citizens, their dependents, and other legal residents are required to have minimum essential health insurance coverage or pay a penalty. We have updated the questionnaire and documentation to help you provide us with the information we need to report your health insurance coverage status and complete the tax forms. Please provide us with all 1095 health insurance forms.

Clients who have their organizer and ALL their information to us by February 28, 2018 will qualify for the 33rd annual Murphy Financial Services, Inc. drawing. The winner will receive a refund of the amount paid to have their 2017 tax return prepared.

In order to have your tax returns prepared by April 17, 2018 you will need to have all your information in our office by March 22, 2018. Clients bringing in their information after this date will be charged extra if they want their tax returns prepared by April 17, 2018. This does not pertain to K-1s. Call our office regarding K-1s.

An alternative to paying the extra charge is to get an extension. An extension allows you to file your taxes by October 16, 2018. Getting an extension does NOT signal the IRS to audit the return.

I appreciate your trust in our business. Please feel free to call our office at (414)453-8655 if we can of any assistance in completing your organizer or in providing any other tax or accounting services.

Sincerely,

Sharon L Murphy EA
Murphy Financial Services, Inc