



January 28, 2015

It is time to start thinking about your 2014 income tax preparation. Kindly send me your income tax information at the earliest date possible to give me adequate time to carefully prepare, review and process your income tax returns for the tax year ending December 31, 2014.

Earlier this month, we sent out our annual tax update memo. If you missed this, you can find it and all of our newsletters archived on our web site www.zulchtax.com.

For your convenience and to save you time, I continue to accept your annual tax materials by mail, email, fax or courier service. Copies are sufficient. We no longer require original documents, so be sure to keep your tax documents in your files for a period of not less than 3 years.

If you prefer to meet with me to discuss your tax returns or any other financial concerns, feel free to call for an appointment.

Important Changes for 2014 Returns

As we shared in our newsletter, there are new tax forms and additional reporting requirements this year for the new health insurance coverage mandates. Please be sure to let us know if you have the required minimum essential health care coverage and be prepared to provide us with the documentation to as proof of coverage. Please see our newsletter for additional information.

Can't remember what tax documents to look for?



Start gathering any documents or forms that will be needed to file your returns: expense receipts, canceled checks, acknowledgements from charities documenting donations, and any other documents that support income or deductions you will be claiming.

Be on the lookout for W-2's, 1099's, and other official tax forms to be arriving soon. Many of these forms are required to be in the mail by January 31, 2015. Some institutions send these forms out electronically, so be sure to watch your e-mail inbox for these items as well.

Here's a quick link to our tax checklist to further help you with your information gathering.

[Tax Checklist](#)