



SCHANEL & ASSOCIATES_{PC}
CERTIFIED PUBLIC ACCOUNTANTS

4600 Military Trail, Ste 215
Jupiter, FL 33458

Ph: (561) 624-2118
Fax: (561) 624-0726

www.schanelcpa.com

January 2020

Dear Valued Client,

Happy New Year and Welcome to Tax Season 2019!

The 2019 tax season is here, and we look forward to working with you throughout the tax preparation process.

While most of the major changes resulting from the Tax Cuts and Jobs Act of 2017 were effective in 2018, the process of implementing and clarifying certain provisions of the law continued in 2019. One key provision new to 2019 was the elimination of the ACA individual mandate penalty.

More recently, the SECURE act was signed into law and will have important impacts on the tax treatment of beneficiary IRAs inherited after January 1, 2020. It also increased the age where Required Minimum Distributions must begin from age 70 ½ to age 72. We are currently researching the full implications of this new law and will provide more information about its impact over the next several months on our blog at schanelcpa.com.

To begin the tax return process, we encourage you to visit our Client Resource web page at www.schanelcpa.com/client-resources. There you will find a series of tools designed to help you work with us throughout the tax preparation process, including the following:

Tax Season Best Practices: Our Tax Season Best Practices document outlines some guidelines that will allow us to best serve you.

Online Tax Questionnaire: Our annual tax questionnaire is a critical part of the tax preparation process. You can complete a tax questionnaire online from your computer, tablet, or smart phone by visiting the Client Resources page.

Engagement Letter: To electronically sign your engagement letter for tax preparation services, visit the Client Resources page and select the appropriate engagement letter.

Uploading Tax Documents Electronically: Once again, you will be able to easily and securely transmit PDF copies of your tax documents to our firm using Citrix ShareFile. To upload your documents using ShareFile, visit the Client Resources page and select "Tax Document Upload".

Tax Organizers: Tax organizers will be available upon request. To request an organizer, fill out the Request Tax Organizer form on the Client Resource page, or feel free to call our offices at (561) 624-2118.

SafeSend Returns: This year we are pleased to introduce SafeSend Returns, an innovative tax return delivery system that will allow you to receive your completed tax return electronically via a secure and intuitive step-by-step web-based interface. To learn more about SafeSend, visit our Client Resource page.

We want to express our gratitude for your business and support. We value you as a client and look forward to continuing to serve you for years to come. If you have any questions, please feel free to call us at (561) 624-2118.

And as always, we thank you for your referrals of family, friends and business associates.

Sincerely,

A handwritten signature in black ink that reads "Schanel & Associates, PA". The signature is written in a cursive, flowing style.

Schanel & Associates, PA
Certified Public Accountants