

# 2016: Ready or Not Here We Go.....

**Al's Tax Service**  
PO BOX 311605  
Enterprise, AL 36331

January 2016  
Volume 2, Issue 1

## Email Change

Just a reminder that our email address has changed. We up dated the server over last summer to better serve all of our clients. If you need to contact us via email, please use the primary email [alstaxb@alstaxservice.com](mailto:alstaxb@alstaxservice.com)

The old CenturyTel emails are no longer valid. Also

be aware each team member in the office has their own version of @alstaxservice.com email account. If you are working with one of them you may receive mail from those accounts as well.



### Inside this issue:

Our Team Ready To Serve	2
Pay Fees With Ease	2
Appointment/Drop Offs Schedule	3
We Appreciate Your Business	3
Year End Checklist	4-5

## Phone Scams

During 2015 we received many phone calls and visits from clients who stated they received threatening phone calls from the IRS. Many of the phone calls stated that you were being sued by the IRS and you must comply within a very short amount of time. The scammers would request personal information. Please note this is a SCAM and DO NOT provide your personal information over the phone with someone who called claiming to be the IRS.

The IRS does not contact people over the telephone for this type of situation. They will send many letters before it even gets to the tax court system. The IRS has provided this information reference receiving one of these phone scams.

If you get a phone call from someone claiming to be from the IRS, here's what you should do:

Call and report the incident to the Treasury Inspector General for Tax Administration at 1.800.366.4484.

File a complaint using the FTC Complaint Assistant; choose "Other" and then "Imposter Scams." If the complaint involves someone impersonating the IRS, include the words "IRS Telephone Scam" in the notes.

### Fun Fact

- In 1913, our whole tax law was 27 pages. It's now over 4 million words, 9,000 bloated pages. From 2001-2012 alone, there were 4,600 changes, more than one a day.

## Our Team Ready to Serve

I am excited to introduce two new team members to our team here at Al's Tax Service. Both team members are a valuable asset to making sure things run smoothly and our clients are taken care of. Customer service is most important and we appreciate all of our clients!!



Dieter Grotheer is our accounts manager here at Al's Tax Service. He joined our team in July 2015. Dieter has served our country in the Army for twenty-four years as an operation specialist. Since retiring in 2007 he has been a manager and has now brought his years of experience to serve our clients at Al's Tax Service. Dieter has been married twenty-seven years to his wife, Tracey. He also has two children and two grandchildren.



Shelby Mote is a 2009 Enterprise High School graduate. She is the Director of First Impressions or the heartbeat of the front office at Al's Tax Service. This will be her second tax season with us at Al's Tax Service. She makes sure that clients are well taken care of and treated with the upmost respect. Shelby currently resides in Enterprise with her husband Justin, their two dogs and two cats. She enjoys completing wood working projects with her husband and playing outside with their dogs.

## Pay Fees with Ease

Can you take my fee out of my refund? The answer is YES using our third party E-Collect system. Additional fees may apply. Please ask your preparer for more details. This service is not done automatically; it must be requested.

We also have the ability for those who are out of town to now pay their invoice by electronic check. This

keeps you from having to call the office and give card information over the phone. The phone option is still available but we are providing you with a second more secure option. Any questions on this let us know. Thank you for your business and we look forward to working with you.



*We at Al's Tax Service hope you have a blessed and prosperous 2016.*

### Did You Know?

- "The present tax code is about 10 times longer than the Bible, a lot more complicated, and, unlike the Bible, contains no good news."  
—Don Nickles, former U.S. senator

# Drop Offs & Appointments



Don't forget to check out our website. We are continually working to improve the website and would love your feedback. [www.alstaxservice.com](http://www.alstaxservice.com)

## *DROP OFFS*

Over the past several years we have been promoting drop offs. This past year the program was highly successful. Just come by the office and drop off all of your documents. If you have not yet tried it and you feel it would better suit your family work schedule, please give it a try. Please note, when your tax return is completed we will call you to come in and review your tax return and to sign the electronic filing authorization forms. (If filing married filing jointly, both spouses will be required to sign these authorizations.)

## *APPOINTMENTS*

Appointments can be made Monday thru Friday. Our office hours Monday-Friday are 8:30AM-5PM (later appointment times available as needed)

Shelby will be handling the scheduling and she will work with you to make sure you receive an appointment.

---

## We Appreciate Your Business

As you may know we strive to provide prompt, professional service to all of our clients. We are pleased to announce there will not be an across the board price increase this year. The only change you will see is if you use an additional or different form from last year, such as the new health care forms.

relevant, we have attempted to bring to you issues that will affect the majority of our taxpayers. Please feel free to call our office with any specific questions you may have. We will do our best to answer these questions on a time permitting basis.

***Thank you for your trust and confidence and we look forward to seeing you in 2016.***

Brittany Dionne



Although this letter has not covered all of the tax issues that are



Click for Review

Also we received accreditation through the Better Business Bureau. There is a place to provide reviews on their website as well.

## Checklist for Tax Year 2015

### General

- Social Security Numbers
- Picture Identification ( i.e., Drivers License, Military I.D. Card.)

### Income

- W-2's/1099's
- Interest and/or Dividend Statement, domestic and/or foreign
- Sale from Investment Property (i.e., sale of mutual funds, land, timber)
- Alimony Received
- Unemployment Compensation
- Social Security Benefits
- Retirement Benefits
- Gambling Winnings (W-2G)
- Grants, Scholarships, or Education Assistance
- Reimbursements for moving, business trips, or TDY

### Adjustments to Income

- Contributions to an IRA, SEP or other qualified plans
- Alimony paid and Social Security Number and Name of Recipient
- Penalties on early withdrawal of savings
- Moving expenses
- Medical Savings Account Contribution
- Interest paid on Student Loan

### Child Care Expenses

- Amounts paid
- Names of individuals/organizations providing child care
- SSAN of individuals or tax number of organizations providing child care
- Individual or organization's address

### Education Expenses

- Form 1098-T, Tuition Payments
- Books
- Required Equipment, i.e. computers
- Other Required Expenses, i.e. registration fees
- Amounts paid by or for the taxpayer, i.e. VA benefits
- Account history from the school

### Taxes

- AD VALOREM (Taxes paid when you register your vehicle each year)**
- Home (Primary & \*2nd home)
- Land
- Quarterly Estimates and Dates Paid
- Investment Property (This could be a 3<sup>rd</sup> home)

## Medical Expenses

- Hospital, Doctor, & Dentist
- Medical Insurance
- Lodging
- Mileage, Ambulance or other required transportation
- Eyeglasses
- Prescription Medicine
- Special Equipment (i.e., wheelchairs, hearing aids)

**Note: It is recommended to substantiate all of your medical expenses. Please have a breakdown of your medical expenses, i.e., prescriptions, dental, doctors, hospitals, insurance, etc. It is recommended you do not just report one gross sum for everything.**

## Interest

- Mortgage Interest, primary & \*2nd home
- Investment Interest (i.e., interest paid on land, purchase of stock, third home)
- 2nd Mortgage or Home Improvement Loans
- Discount Points/Loan Origination Fees

\* This could be a motor home or boat that qualifies as a second home.

**NOTE: If you bought a home, refinanced or took out a second mortgage, please bring in the closing settlement papers (commonly referred to as the HUD forms).**

## Charitable Contributions

- Money and/or materials donated to nonprofit organizations
- Mileage for volunteer work

**Note: Please bring in any documentation to substantiate any donations made, particularly cash contributions and non-cash contributions. Please adhere to the new guidelines for claiming non-cash contributions to charitable organizations. (A bag of clothes valued at a given price will not be considered adequate documentation.) For both cash and non-cash contributions a record must be provided that states the name of the organization, its address, the date, amount of the contribution and a statement that the organization did not provide you with any consideration in return for the contribution, if that is true.**

## Miscellaneous Expenses

- Tax Return Fee
- Uniforms required but not provided by employer
- Union or Professional Dues
- Tools or supplies required but not provided by employer
- Professional Publications
- Investment Expenses
- Safe Deposit Box Fee
- Business/TDY Travel Expenses
- Business-related Expenses
- Business-related Mileage (For military, this would include mileage incurred for PT.)
- 2nd job mileage
- Casualty or Theft Losses
- Home office expenses
- Job seeking expenses
- Gambling expenses/losses

Remember, this is just a partial list of various types of income, expenses, and deductions needed to prepare your tax return. There may be other items of interest that were not listed, if you are not sure if something needs to be reported, please bring it to our attention when we do your tax return.