

**WOLFSOHN FINANCIAL SERVICES, INC.
NEW YORK TAX SERVICES, INC.
L.I. TAX SERVICES, INC.
NEW JERSEY TAX SERVICES, INC.
Financial, Tax and Management Consultants
153 Broadway
Lynbrook, NY 11563-3252
(516) 887-7380 Fax (516) 599-8621
WWW.WOLFSOHN.BIZ**

Dear Client:

December, 2009

We are pleased to enclose our Year-End Client Newsletter. We have included some helpful tax tips and other enclosures that may interest you, so take a few minutes to review our year-end mailing.

This coming tax season, along with our main office in Lynbrook, we will be offering services from Hauppauge, Manhattan and Florham Park, NJ. Some of our clients will be pre-scheduled based on last year's appointment for mutual convenience. Please review our **Tax Appointment Checklist** and bring all pertinent information with you at the time of your interview. *Also, be sure to make your appointment as early as possible by calling 516-887-7380.* Please note that Business clients may need two appointments to prepare both their business and personal tax returns.

We remind you that we offer complete computerized accounting, bookkeeping and consulting services for small businesses. Financial planning services, pension, and IRA accounts can be established, along with a varied line of investment services that can be purchased throughout the year with our Certified Financial Planner. In addition we can now review your home, auto, health and business insurance policies for possible savings and offer you many mortgage and refinancing options.

For those of you who mail in your return information or drop it off to us, please make sure that you advise us of **ANY CHANGES** such as new address, current day and evening phone numbers, email address, marital status and any change in dependents with birth dates and social security numbers.

We will be filing all returns electronically. Refunds can be deposited in multiple accounts, however please make sure you bring your checkbook with you in the event that you need to make a payment with your return. (electronic returns may not be processed from mail-ins). We will give you a CD which will have a copy of your tax return on it for your records. Your **social security number** will be your password.

We look forward to seeing you again this year and hope you will recommend our services to your family, friends, neighbors and co-workers.

Regards,

Jonathan Wolfsohn & Staff

12/31/09 Personal Year End Maneuvers

1. Make charitable donations and get receipts
2. Set up self employed pension retirement plans, several options to choose.
3. Sell losing stock and mutual fund positions that net at \$3,000 loss
4. Pay State/City estimates before 12/31/09, Federal estimates by 1/15/10
5. Prepay a 13th mortgage payment
6. "Push" income into next year also "pull" itemized deductions into 2009
7. 70-1/2 year old minimum IRA distributions "RMD" should be made by 12/31/09 (waived in 2009)
8. Read our web page and tax tips newsletter for other ideas
9. Organize your 2009 records and make an early tax interview appointment **ASAP**

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12/31/09 Business Year End Maneuvers

1. Some business asset purchases get **bonus deductions**
2. Set up small business pension retirement plans, several options to choose
3. Mark down the mileage from your business auto on 12/31/09
4. Prepay deductible business related bills
5. Mark up your cell phone bills with who, what, why? answers (minimum two months)
6. Read our web page and tax tips newsletter for other ideas
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LOCATIONS - same as last year!

1. ***Lynbrook*** 153 Broadway (Main Office)
2. ***Manhattan*** 352 Seventh Avenue Suite #703 between 29th/30th Street
3. ***Hauppauge*** 3124 Expressway Dr. So. Islandia (in Coldwell Banker Realty)
4. ***Florham Park, NJ*** 175 Park Avenue (in Hamilton Park Hotel)

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2009

AUTO BUSINESS USE CARD

12/31/09 ODOMETER READING _____

AUTO MAKE/MODEL/YEAR

- 1. Business Miles _____
 - 2. Commuting Miles _____
 - 3. Personal Miles _____
- TOTAL MILES (1+2+3)** _____

OWNED

Total Cost \$ _____

(include tax, delivery & date if purchased this year)

LEASED

Total Payments \$ _____

EXPENSES FOR THIS AUTO ONLY

Gas _____

Repairs _____

Tires _____

Insurance _____

Wash/Wax _____

AAA _____

Registration _____



Use one card per car. Copy card if needed

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2009

RENTAL INCOME

Address _____

Business % of Property _____

Ownership % of Property _____

1. Rent Paid _____

2. Rent Paid _____

3. Rent Paid _____

Total Rent _____

EXPENSES PAID BY OWNER

Mortgage Interest 1 _____

Mortgage Interest 2 _____

Real Estate Tax _____

Insurance _____

Electric _____

Gas/Oil _____

Other _____

Repairs to Tenants Space _____

Repairs to Common Space _____

Don't Forget to bring Closing Papers if Property was Purchased, Refinanced or Sold this year



Use one card per property. Copy card if needed

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Tax Appointment Checklist

FOR APPOINTMENT CALL
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Date: _____ Time: _____

Please see reverse side for our office locations.

DON'T FORGET TO BRING:

- List of Questions
- Income Slips W-2's, 1099INT (Interest),
1099DIV(Dividends),
1099B (Stock Sales), 1099R, 1099Misc,
1099T (Tuition), 1098E (Student Loan Interest),
Lottery, Jury Duty
- Buy Slips MATCHING YOUR STOCK SALES
(please match stock transactions in full dollar amounts)
- Dependent and spouse's **Social Security Cards**
- Estimates Paid list with check #s and amounts
- Receipt and checkbook **Expenditure Totals**
(Write up and bring your checkbooks and
please add up your receipts before appointment)
- Credit Card statements and **Year-End Summaries**
- IRA / Pension / Bank **Investment Statements**
- Check Routing Numbers for Direct Deposits
(up to 3 accounts this year)
- Rental House Write-Up (Total all income & expenses
by category)
- Business Write-Up (Total all income & expenses by
category)
- Business Auto Write-Up (Total all expenses by
category)
- Home Mortgage 1098 Interest /Real Estate Taxes &
Year End Statements
- 529 Plan Information
- Payment: Check / Cash / Credit or Debit Card



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- Credit Card statements and **Year-End Summaries**
- IRA / Pension / Bank **Investment Statements**
- Check Routing Numbers for Direct Deposits
(up to 3 accounts this year)
- Rental House Write-Up (Total all income & expenses
by category)
- Business Write-Up (Total all income & expenses by
category)
- Business Auto Write-Up (Total all expenses by
category)
- Home Mortgage 1098 Interest /Real Estate Tax & Year
End Statements
- 529 Plan Information
- Payment: Check / Cash / Credit or Debit Card

