

# **IMPORTANT!!!!!! MUST READ!!!!!!**

Please be sure to fill out this organizer to the best of your ability. If you have any questions, please call or email me. (maktax@gmail.com). It is important I have the proper information to file your return.

If you live in AL, AR, CA, IA, HI, MN, NY or PA, your state still allows employee business deductions. Be sure to fill out the flight crew deductions. For UAL employees, please send company issued per diem report. For DAL, go to ecrew, my schedule, preferences, schedule leg data extractions. Have that info sent to your DAL email account, and immediately forward that email to me at

*maktax@gmail.com*

If you get a notice from a taxing authority (IRS, State), PLEASE call immediately and send me a copy of said notice. I can't help you if I don't know about it.

IRS regulations prohibit me sending copies of tax return to 3rd parties UNLESS I have written confirmation from you. Please be aware of this as you might need a copy of your return to be sent to a loan officer.

**SECURITY:** The IRS requires that I protect your personal information, which I always have. I have firewalls protecting your data as well as password requirements to access data. In a greater effort to protect your info, I ask that you NOT email your info to me. Instead, please utilize my secure portal,

**[maktax.securefilepro.com](http://maktax.securefilepro.com)**

On the right hand side of the site, there is a box, GUEST.....click on that and follow the instructions on how to send me documents. Many of you have used this site with great success.

Positive ID is also required by the IRS. To fulfill that requirement, I need a copy of your driver's license or state ID, both front and back.

A tremendous amount of time is spent chasing items that should have been included in the paperwork sent to me. PLEASE use the checklist and make sure you have sent those items to me!! Even some W2's were missing! Double check before sending info to me!

Speaking of sending, 3 ways are available.....secure portal, mail to PO Box, or Fedex/UPS address. **PLEASE** send items requiring a signature to the PO Box.

Mailing address: P.O.Box 40325, Glen Oaks, NY 11004-0325

Fedex/UPS: 8007 221st St, Queens Village, NY 11427

Please be aware that if you have a foreign bank account, this **MUST** be declared. If the balance is more than \$10,000 in the aggregate, you must fill out a Treasury form by 4/15. Banking regulations require foreign banks to disclose US owned accounts to the US government. There are severe penalties for non compliance. Please include information so I can include it on your tax return.

If you have dependents, I will need a copy of birth certificate, social security card, and documentation from school, church or a physician that the child lives with you. If I have their info from previous years, it is not necessary to fill out the dependent part of organizer., just put their name. If you have previously sent SS card & birth certificate, I keep those on file, so not necessary to send again.

Filing date this year is April 18th due to April 15th being the Emancipation Day celebration. Every year I get more returns towards end of March and I get bogged down. So, if I don't have your papers by April 1st, I will attempt to finish your return, but there is a possibility of an extension being filed.

Please be sure to sign all documents requiring a signature!

I look forward to hearing from you!

Mary Ann