Happy New Year and Welcome to Tax Year 2019!

Please DO NOT SEND ANY SENSITIVE INFORMATION through an unencrypted email. This includes social security numbers, birthdates, full names, bank account numbers, etc. We have more on this, later in this letter.

Our goal is to complete your return by the filing date if you get all your documents to us by Friday, March 20. We request that you bring us as many documents as you now have so we may begin preparing your return. We generally work on returns in the order received, and by mid-March we expect the queue to be full. After that date, we can't guarantee we can complete your return by the filing date, which is April 15 this year.

To help expedite your returns, several staff members may enter data, email you with questions and/or call you. All returns will be finished and reviewed by a CPA or an Enrolled Agent. We know you may get confused by our workflow, so please check out our About Us tab for our bios and pictures.

2019 Client Packet

Our 2019 "client packet" is available on our website (under "Individuals") and from your secure client portal ("JK Docs"). The packet includes our engagement letter and various questionnaires. See below to find out which forms you will need to fill out. Our tax software can also produce individualized organizers. If you would like an organizer uploaded to your client portal, please send us an email, client portal message, or call the office. We will print and mail organizers upon request.

Everyone should fill out the following set of documents which are included in the 2018 1040 Essential Set:

2019 Engagement Letter	Return the signed, dated letter to us with your tax documentation. Spouses must also sign.
7216 form	If you consent, return the signed and dated form to us with your tax documentation.
2019 1040 Questionnaire	Return the completed, signed, dated form to us with your tax documentation.
2019 Interview Questions	If you are not coming in for a tax interview meeting, please answer the questions and return the signed, dated form to us. If you are coming in for a tax interview meeting, we suggest answering the questions prior to the meeting to save time.
2019 Due Diligence	If you have dependents you must fill out this form. Because it is required by so many clients we have included it in the essential set this year. It is required for the Child Tax Credit, Education Credits, Earned Income Tax Credit, or Head of Household filing status.

Forms from the 2019 Supplemental Set only need to be printed and filled out if applicable to you:

2019 Business Interview	Schedule C (business) and E (rental) clients must return the signed, dated questionnaire to us with your tax documentation.
2019 Foreign Interests	Answer these questions if directed on the 1040 Sheet

2018 Extended Health Care	If you did not have health coverage for your entire household the entire year, you must fill out this worksheet. The law still requires you to have health insurance but the penalty is $0 in 2019.

These Info documents are for your information and do not need to be returned to us:

Privacy Policy	Keep the Privacy Statement for your records
Meet Our Staff	Nothing to print or sign! Just get acquainted with us.

If you have questions about the paperwork or the source documents you should submit to JK Associates, LLC, please visit our web site, JKAssociatesTax.com, email your questions, or just call our office at 410-884-0317.

Getting tax documents to us

There are a number of ways you can get your tax documents to us. You can always make an appointment with us to discuss your forms and the questionnaires, or you can drop off documents at our office at 9520 Berger Rd, Ste 310, Columbia, MD 21046. You can also mail them to us (we prefer copies over originals) or FAX documents to 410-730-3337.

Please do not email us documents. Opening email attachments is a security risk and we will need to verify by phone call before we open an attachment. You may email answers to questions but please recognize that email is not secure and please do not include any sensitive information.

Our client portal is a secure way to send your documents and communicate with us.

Instead of emailing a document to us, you can upload it to our secure portal. All our clients have a secure portal account set up for them – you can access it from our website, www.JKAssociatesTax.com, on the "Secure Portal" tab. This is our preferred method because of its security but also because we also can return documents, such as your completed tax returns and signature pages, to you securely. There is also a portal message system if you need to communicate sensitive information, such as an account number, birthdate, or social security number. You cannot direct a portal message to a specific preparer, so you will need to include the recipient in the message. We will be posting a guide (with pictures!) on our website, but you can contact our office if you have any problems accessing the portal.

Protecting your privacy and identity is extremely important to us. Please call our office if you have any questions or need help with our website or portal.

Questions? Please call us at 410-884-0317! We are looking forward to seeing you soon.