

November 2, 2009

Issue 2009-23

ExacNews

ExacTax Client:

The 2008 filing season is hardly over and we're already preparing for 2009. Based on your comments and suggestions input field sizes and the zip numbers have been enlarged where possible, to make reading and entering amounts easier. In addition, several new federal forms and worksheets will be available for 2009 returns, including Schedule L (Standard Deduction for Certain Filers), Schedule M (Making Work Pay Credit), 1099A (Abandoned, Foreclosed, Repossessed Property), 8936 (Qualified Plug-In Vehicle Credit), 8891 (Canadian Registered Retirement Plans), Insolvency Worksheet, Consent to Disclose Tax Information and Consent to Use Tax Information. The federal health care initiative is still in progress and if passed, will most likely impact the 2010 return if not 2009 as well. Stay tuned for updates.

Tax Organizers

Tax Organizer order forms for 2009 were shipped last week. To change an order or client information to be included in the first run, you must return your order forms and address change forms by **November 13th**. The first run of organizers is scheduled to begin shipping by the end of November.

If you do not request any changes, **OR** you do not return the order form, organizers will be printed based on your original selections shown on your order form. **You will be billed for all printed Organizers and credit will not be issued.** To make changes to a taxpayer's address on the organizer, labels and proforma, submit changes on the 2009 Taxpayer Permanent Address Change Request Form that was included with the Tax Organizer Order Form.

⇒ **Tax Organizers will not be printed for non-renewed or C.O.D. accounts. Late renewal or C.O.D. status will delay the shipping of organizers, proforma and supplies.**

1040 Client Labels

A set of client labels will be shipped at the same time as the Tax Organizers, at no additional charge. The set contains two labels for each 1040 return processed by November 13th. An order form for requesting additional billable label sets will be included. To order billable labels prior to November 30th, contact Customer Support.

Holiday Card/Calendar and Tax Newsletter Orders

Keeping in touch with your clients is always important, especially in the current economic environment, and holiday cards and newsletters offer a low cost way to do just that. Order forms for these were mailed out last week. The deadline for returning your order for the personalized 2009 holiday card/calendar and end-of-year tax newsletters is November 13th. Please return your order ASAP.

2010 Workshop Schedule

The 2010 Exactax workshop schedule and registration will be included with the next bulletin.

Billing Queries and Reminders

When requesting adjustments to your billing, state the problem in the comment section of your remittance and include it with your payment. Any problems or questions regarding billing queries may also be faxed directly to the Accounting Department at 714-999-6566. Requests for credit must be made in writing.

IMPORTANT: Accounts with an outstanding balance over 21 days will be placed on C.O.D. status. C.O.D. accounts will be shipped UPS C.O.D. until the account is current. → C.O.D. status will delay shipment of proforma and organizers!