Tax Preparation
Wills & Estates

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FREQUENTLY ASKED QUESTIONS

HOW MANY YEARS HAVE YOU BEEN PREPARING TAX RETURNS?

HOW MUCH DO YOU CHARGE?

ARE EVENING & WEEKEND APPOINTMENTS AVAILABLE?

WHO WILL PREPARE MY RETURN AND WHAT ARE HIS / HER QUALIFICATIONS?

WHAT SHOULD I BRING TO THE INTERVIEW?

WHAT IF I DON'T HAVE ALL MY INFORMATION AT THE INTERVIEW?

CAN I MAIL MY TAX INFORMATION TO YOU IN LIEU OF AN INTERVIEW?

HOW QUICKLY DO YOU COMPLETE MY RETURN?

DO YOU OFFER ELECTRONIC FILING?

WILL YOU HELP ME IF I AM CONTACTED OR AUDITED BY IRS?

WHY NOT USE A TAX COMPUTER PROGRAM INSTEAD OF A TAX PROFESSIONAL?

HOW MANY YEARS HAVE YOU BEEN PREPARING TAX RETURNS?

This is my 35th year offering Tax Preparation and Tax Planning for individuals.

Tax preparation should be more than preparation of your current year Tax Return.

The benefit of having your Tax Return prepared in our office is a combination of:

- Having your Tax Return accurately prepared each year at a reasonable fee by a firm specializing in taxation of individuals.
- Learning about options you may wish to consider to enable tax savings or increase your financial well-being.
- Having access to tax information throughout the year from someone familiar with your financial/tax situation.

HOW MUCH DO YOU CHARGE?

Our base fee is $300. Generally, this includes all interviews, preparation of Form 1040, Schedule A (itemized deductions), Schedule B (interest/dividends), and Form 760 (Virginia State or other comparable state return).

We are unable to determine your precise fee until completion of your tax return. Our fee is based upon the types of tax issues presented, the length of the return, and the time needed to complete the return. Generally, **two thirds of our clients will pay $300 - $500**.

ARE EVENING & WEEKEND APPOINTMENTS AVAILABLE?

Daytime tax appointments are available **Monday - Friday, Saturday & Sunday.**
Evening tax appointments are available **Monday - Thursday**.

Mon - Thur	Friday	Saturday	Sunday
9:30 am	9:30 am	9:00 am	9:00 am
10:45 am	10:45 am	10:15 am	10:15 am
		11:30 am	11:30 am
12:00 pm	12:00 pm		
2:15 pm	2:15 pm	1:45 pm	1:45 pm
3:30 pm		3:00 pm	3:00 pm
4:45 pm		4:15 pm	4:15 pm
		5:30 pm	
7:00 pm			
8:15 pm			

WHO WILL PREPARE MY RETURN AND WHAT ARE HIS / HER QUALIFICATIONS?

Our Professional Staff:

ROBERT A. FORST
BBA, University of Michigan, 1971
JD, Washington & Lee University, 1976
Admitted, Virginia State Bar, 1976
Admitted, United States Tax Court, 1979
MS (Taxation), Southeastern University, 1981

SHARON DILLING
BA, Wheaton College, 1971
Coursework, Federal Taxation, 1974, 1986 – '89
Mgr/Preparer, Clark's Tax & Bookkeeping 1974 – '76
Preparer, Robert A. Forst Esq., 1987 – '09

JANICE SMITH
BS, Mansfield University, 1972
West Point Tax Center, 1999 – '00
Coursework, Federal Taxation, '91, '93, '00, '04
Reviewer/Preparer, Robert A. Forst, Esq., 2004 – '09

NANCY C. PERGOLIZZI
BS (Business Admin), Univ of North Carolina, 1977
JD, Wake Forest University, 1984
Self Employed, Legal, Tax, Accounting services 1992 – '05
Preparer, Robert A. Forst Esq., 2006 – '09

EDWARD M. KAVJIAN
BS, Business Admin, Bucknell Univ., 1975
JD, Boston University School of Law, 1978
General Motors; Tax staff, Lobbyist, other 1981 – '01
Reviewer, Robert A. Forst Esq., 2002 - 09

PAT STRINGER
BS, Florida State University, 1964
Congressional Staff of Sam Gibbons, 1989 – '97
Payroll/Bookkeeping, Lawrence Pripeton, CPA, 2000 – '08
Reviewer, Robert A. Forst Esq., 2001 – '09

DORIS GOLESORKHI
George Mason Univ, Candidate Accounting degree
Federal Taxation coursework, 2005
A/R Accountant, US Conf of Catholic Bishops 2000 – '06
Reviewer, Robert A. Forst Esq., 2003 – '09

The person who conducts your interview is also responsible for entering the information into the computer and conducting the initial review of the return. After this review, the return undergoes a second review by another staff member. When your preparer considers the return correct, then the return is assembled for submission to IRS and the State with copies for the client and our files. You may request the same preparer each year or request a different preparer in subsequent years.

WHAT SHOULD I BRING TO THE INTERVIEW?

Please download our **Tax Organizer** to help you collect the information you will need to file your Tax Return. Please **fill in** (***use pencil & round off to whole dollars***) as much of the Organizer as possible, **unless** the **Organizer states** that the **"Preparer will complete this part"**. Please bring the Organizer to your interview. Other items you may need to bring:

- ***New clients should bring their tax returns from the last two years.***
- W-2s, 1099-Rs, 1099-Int., 1099-Div., 1099-Misc., or any other 1099s you receive.
- 1099-Bs or other statements from brokers or mutual funds setting forth any sale activity.
- Records supporting your itemized deductions (medical, real estate tax, personal property tax, Form 1098 mortgage interest, investment interest, charitable contributions, miscellaneous employee and investment expenses, and any other expenses you believe may be deductible).
- Settlement sheets from real estate purchases, sales, and refinancing. If you sold a property, bring the settlement sheet for its purchase and sale, as well as, any refinancing, a list of capital improvements, and a depreciation history if rented at any time. Also bring a copy of the tax return for the year that you purchased the property that has been sold.
- Automobile records, if used for business.
- Business records from self-employment.
- Rental property records.
- K-1's from Partnerships, Limited Liability Companies, S Corporations, Estates, Trusts.
- Any other records or documents you deem important.

We will answer your questions and complete the Organizer at the interview.

WHAT IF I DON'T HAVE ALL MY INFORMATION AT THE INTERVIEW?

At the interview, approximately half of our clients find that they do not have all the necessary information. You can **deliver, phone, mail, E-mail, or FAX the additional information** after the interview. We will complete your return as soon as possible after receiving all your information.

CAN I MAIL MY TAX INFORMATION TO YOU IN LIEU OF AN INTERVIEW?

YES. Clients who are overseas mail their tax information every year. Also, clients who have moved from Northern Virginia continue to mail their tax information to us. Upon receipt of your information, a tax preparer will be assigned to your file. Whenever necessary, a phone conference will be set up to ensure that all information has been submitted. Once the return is completed, you will be contacted and informed of your refunds or tax liability and fee for preparation.

HOW QUICKLY DO YOU COMPLETE MY RETURN?

Generally, your return is **completed within 2-7 days after all information is received**. We will phone you when the return has been completed. You pay for the return when you pick it up. We will give you a copy of your return and envelopes to mail the originals to IRS and the State.

DO YOU OFFER ELECTRONIC FILING?

Electronic filing (Efile) is a method of filing your tax information via the Internet to IRS. For tax years beginning after 12/31/2009, IRS is requiring tax professionals to Efile. However, we do not believe the additional cost of electronic filing (hardware, software, and office time) and security concerns expressed by our clients (e.g., sending their tax information, name, address, & social security number over the Internet) justifies its use. Currently, our office computers that contain your tax returns are not online at anytime. Even if you do not file electronically, IRS will direct deposit your refund into your checking account, savings account, or IRA. To enable direct deposit of your refund, see Form 1040, page 2.

WILL YOU HELP ME IF I AM CONTACTED OR AUDITED BY IRS?

YES. If you receive a letter from IRS or the State concerning a return we have prepared, we will prepare a response to IRS or the State. If a return we prepared is selected for audit, Mr. Forst will meet with you and prepare you for the audit. There is no charge for these services. For a fee, you may retain Mr. Forst to represent you at the audit. If so, you do not need to attend the audit unless required by IRS.

WHY NOT USE A TAX PREPARATION COMPUTER PROGRAM INSTEAD OF A TAX PROFESSIONAL?

A **tax preparation program** will allow you to enter your data, carry your entries to the proper forms, correctly total your entries, and compute your tax liability based upon the information you've entered. The **results are solely dependent upon the information entered. A tax preparation program does not determine what should be entered.**

GENERALLY, A TAX PREPARATION PROGRAM WILL NOT ADVISE YOU:

- when to amend a prior year return to take advantage of a tax law change
- concerning the proper withholding and payment of estimated taxes to avoid penalties
- whether contributions to a 401k, 403b, Keogh, SEP, SIMPLE, or IRA should be made
- whether a conversion to a Roth IRA should be considered
- whether a business vehicle should be purchased or leased
- whether to use (i) the mileage allowance or (ii) actual expense method for business vehicles
- how to properly determine the basis of your real estate
- how to deduct expenses of a beach property to maximize your deduction under the passive loss rules
- how to properly determine the basis of your mutual fund using the "average cost" or the "first in first out" method
- when to elect to treat capital gains as investment income
- concerning the relationship between the income tax and the estate/gift tax
- many, many other decisions.

Importantly, a tax preparation program does not respond to letters received from IRS during the year, or offer you assistance and differing perspectives on various tax questions that may arise during the year.