

**ROBERT A. FORST, Esq**

*Florida:*  
8251 Bayview Crossing Dr  
Winter Garden FL 34747  
(407) 347-7085  
[Best contact by Email]

*Tax preparation*  
**4taxprep.com**  

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*rf@4taxprep.com*

*Virginia:*  
10195 Main St, Suite C  
Fairfax VA 22031  
(703) 273-6116  
fax (703) 591-0335

## **FREQUENTLY ASKED QUESTIONS**

**HOW MANY YEARS HAVE YOU BEEN PREPARING TAX RETURNS?**

**HOW MUCH DO YOU CHARGE?**

**ARE EVENING & WEEKEND APPOINTMENTS AVAILABLE?**

**WHAT SHOULD I BRING TO THE INTERVIEW?**

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

**CAN I MAIL (OR DROP-OFF) MY TAX INFORMATION TO YOU?**

**HOW QUICKLY DO YOU COMPLETE MY RETURN?**

**DO YOU EFILE MY TAX RETURN?**

**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?

I began preparing tax returns for individuals beginning in tax year 1974 and for trusts and estates beginning in tax year 1978.

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 consider enabling tax savings or improving 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 \$700.** 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 \$700 - \$950.**

## ARE EVENING & WEEKEND APPOINTMENTS AVAILABLE?

**Daytime** tax appointments are available **Monday - Sunday.**

**Evening** tax appointments if scheduled.

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

## WHAT SHOULD I BRING TO THE INTERVIEW?

Please download ([4taxprep.com](http://4taxprep.com)) 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 Tax Organizer as possible, **unless** the Tax **Organizer states** that the "**Preparer will complete this part**". Please bring the Tax 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., SSA-1099 or any other 1099s you receive.
- 1099-Bs or other statements from brokers or mutual funds setting forth any sale activity.
- Records of any crypto-currency transactions during the year (beginning in 2019).
- Proof of Health Insurance and Forms 1095-A, 1095-B, and 1095-C (if applicable).
- Records supporting your itemized deductions (medical, real estate tax, personal property tax, Form 1098 mortgage interest, investment interest, charitable contributions, Misc employee & investment expenses, any other expenses you believe may be deductible) [Re: TCJA thru 2024: Misc itemized deductions are not deductible on the Federal return, although states (not Virginia) may allow if you itemize].
- 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.
- Business records from Self-Employment and/or Employee business expenses, including automobile records, if used for business.
- Rental property records.
- Schedule K-1s from Partnerships, LLCs, S Corporations, Estates, Trusts. Beginning 2018, basis must be included with the K-1 if you are deducting a loss or received a distribution.
- Any documents to support any tax credit (e.g., 1098-T tuition payments, required beginning 2019)
- 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, Email (see next page), 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 (OR DROP-OFF) MY TAX INFORMATION TO YOU?

**YES.** Clients who are overseas and clients who have moved from Northern Virginia mail their tax information every year. Many clients who reside in Northern Virginia also mail or drop-off their tax information to us. **You may Email [pdf scan] your information, but due to security concerns, we believe that it is not wise to send information with social security numbers or account numbers via Email; we cannot ensure that such information is secure.** Upon receipt of your information, a tax preparer is assigned to your file. Most of the time, a phone conference is set up to ensure that all information has been submitted. Once the return is completed, you are contacted and informed of your refunds or tax liability and the 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. We will Efile your return (after receiving signed authorization) unless you elect to have the return “paper filed”. You will receive a copy of your return.

## DO YOU EFILE MY TAX RETURN?

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 requires tax professionals to Efile. Generally our dedicated office computers that contain your tax file are only online to Efile tax returns and download tax software. Each office has a 2nd computer to enable Internet access for Email, research, etc.

You may elect not to Efile and continue to “paper file” your return.

Whether Efiling or “paper filing”, IRS can direct deposit your refund into your checking account, savings account, and/or IRA.

## 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/State.

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

A **tax preparation program** allows 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 minimal withholding and payment of estimated taxes to avoid penalties
- about contributions / distributions to a 401k, 403b, 457, Keogh, SEP, SIMPLE, IRA or Roth IRA
- if a conversion to a Roth IRA should be considered
- how to maximize the new qualified business income deduction (QBI)
- should business vehicles be purchased or leased, [no like-kind exchange beginning 2018, trade in of a business vehicle is now reported as a sale]
- 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", the "first in first out" method, or another method
- whether 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.