

2018 *Business* DSA Tax Organizer

We hope that you had a very successful year and that your experience with DSA has been a growing and pleasurable one. It is now time to collect your business tax information for the rapidly approaching tax season.

*Please review the **Due Dates** below and keep this page as reference.*

January 31, 2019

- 1099-MISC** due to **Contractors**
- 1099-MISC** (with **1096**) due to the **IRS**
- W-2's** due to **Employees**
- W-2's** (with **W-3**) due to the **Social Security Administration**

*If you have paid a Contractor **\$600 or more** you will have to issue them a 1099-MISC and file it with the IRS*

*Please visit **DSATAX.COM** or call DSA at 1 (800) 879-6605 to request blank forms or if you have any questions.*

February 8, 2019

- 2018 DSA Monthly Reports*** due to **DSA**
- 2018 Business DSA Tax Organizer*** & any business related documents, due to **DSA**

Please only send copies of forms to DSA - keep originals for your records indefinitely!

***Extensions** may be necessary if your Monthly Reports, Tax Organizers and related documents are **not** submitted by the above due dates. To request **Extensions**, complete the last page (**PAGE 3**) of this Tax Organizer and return to DSA as soon as possible.

You can also log in at **DSATAX.COM** to submit **Extension Requests** in the **Submit Online** section.

February 22, 2019

- 2018 Personal DSA Tax Organizer*** & any personal related documents, due to **DSA**

The **Personal DSA Tax Organizer** will be mailed following this Organizer.

Please only send copies of forms to DSA - keep originals for your records indefinitely!

March 15, 2019

- Business (S-Corporation) Tax Returns are due!**

*If an extension has not been filed, the late filing penalty is usually **\$195** per each additional month late!*

April 15, 2019

- Personal Tax Returns are due!**

*Failure to file penalty is usually **5%** of your unpaid taxes for each additional month late!*

2018 *Business* DSA Tax Organizer

This **Business DSA Tax Organizer** is **mandatory** and will aid DSA in preparing your Business Tax Return(s). Please enter your 2018 data in the designated areas making sure your entries are legible to prevent any delays.

Please attach any additional information and copies of forms with this Organizer.

The **Personal DSA Tax Organizer** will be mailed following this Organizer.

SECTION ONE: PERSONAL DATA

Business/ Corporation Name		EIN:	
Owner Full Name		SS#:	
Mailing Address			Apt #
City	State	Zip Code	

Is your **Physical Address** the same as your **Mailing Address**? YES NO

If **no**, my physical address is:

Please check a box below for the best number and email for us to reach you

Home Phone	<input type="checkbox"/>	Fax #	<input type="checkbox"/>
Cell Phone	<input type="checkbox"/>	Cell (Alt.)	<input type="checkbox"/>
Primary Email	<input type="checkbox"/>	Email (Alt.)	<input type="checkbox"/>

To expedite processing, DSA can email your Tax Returns as a PDF password protected document to the **primary email** listed above

Would you like DSA to send your returns by email in a **password protected .PDF file**? YES NO

Do not download or open attachments in a public setting!

SECTION TWO: FORMS 1099-MISC FOR CONTRACTORS

Did you make any payments in 2018 that would require you to file **Form(s) 1099**? YES NO

If **yes**, did the corporation file (or **will it file**) required Forms 1099? YES NO

If you have paid a Contractor \$600 or more during the year you will have to issue them a 1099-MISC, no later than January 31st!

Please call DSA at **1 (800) 879-6605** to request blank forms or if you have any questions

Please note that you should always have a contract with your part time helper, please refer to the DSA Client Manual for further information

OPTIONAL: REQUESTING DSA TO PREPARE ONLY YOUR BUSINESS RETURN(S)

Check this box if you want DSA to **ONLY** prepare your **BUSINESS RETURNS!**

Checking the box above means you use another Accountant for your Personal Tax Return preparation. Please remember, your business return **must be** included on your Personal Tax Return!

For **Corporations**, Business Return Only means DSA will only prepare your Corporate return (example: 1120S)

For **Sole Proprietors**, Business Return Only means DSA will only prepare your Schedule C (or year-end financials)

- Complete this **Mandatory Business DSA Tax Organizer** and **submit to DSA by February 8, 2019**
- Make sure all of your **Monthly Reports** have been submitted for the 2018 tax year
- Provide copies of **Business Related Closing statements** regarding the sale/purchase of real property or route territory
- Provide a copy of your **1099 from your bakery company** or **year-end summary**, if available
- For **Sole Proprietors**, please provide copies of any **1098 Mortgage Interest statement(s)**

SECTION THREE: EMPLOYER'S QUARTERLY PAYROLL TAX PAYMENTS

Actual Payroll Tax Payments you have made using the payment voucher **941-V** (for Form 941: Employer's Quarterly Federal Tax Return) or state equivalent vouchers (i.e. **State Withholding and Unemployment taxes**)

941 Amount Paid	Due Date	Date Paid	State Amount Paid	Date Paid	State Payee Name
\$	4/30/18		\$		
\$	7/31/18		\$		
\$	10/31/18		\$		
\$	1/31/19		\$		
Other Amount Paid	Due Date	Date Paid	\$		
\$			\$		
\$			\$		
\$			\$		

SECTION FOUR: AUTOMATIC PAYMENT WITHDRAWAL FOR BUSINESS TAX DUE TO STATE

Some states require all business filings & payments be made electronically. If needed, DSA will enter your bank information on your return to expedite processing, but payment will not be initiated until you authorize the return can be e-filed.

Massachusetts, New Jersey, New York & Tennessee have mandatory electronic payment requirements

Name of your Financial Institution: _____

Routing Number: _____ **ROUTING NUMBER MUST BEGIN WITH 01 through 12 or 21 through 32**

Account Number: _____ **BUSINESS ACCOUNT**

Account Type: _____ CHECKING SAVINGS

CONTACT

You can call
 DSA at
1 (800) 879-6605
 or email
 your Representative

Extension

CUSTOMER SERVICE	0	customerservice@dsatax.com
BRIAN HOLLOP	7110	bhollop@dsatax.com
BRISCILA ALBERTO	7126	balberto@dsatax.com
JASON HOLMES	7102	jholmes@dsatax.com
MIKE LALLA	7114	mlalla@dsatax.com
MILTON TENEZACA	7103	mtenezaca@dsatax.com
VINNY DiNOTTE	7101	vjdinotte@dsatax.com

REMINDERS

- This **Business Tax Organizer** & copies of forms are **due no later than FRIDAY, FEBRUARY 8th, 2019**
- Only send **copies** of forms to DSA - keep originals for your records indefinitely!
- **Please note:** Due to tax law changes, **entertainment** can no longer be deducted for 2018.
- Federal mandate requires all returns where applicable must be e-filed at no extra cost.

ADDITIONAL INFORMATION

Please enter any additional information here and attach all corresponding documents

EXTENSIONS

Complete this page only if you request DSA to file extensions on your behalf.
 If you are requesting extensions, this page should be sent to DSA as soon as possible to prevent delays.

*Extension requests must be received **no later than 2 days before the Due Date!**
 Please call your Account Representative at 1 (800) 879-6605 to **confirm receipt.***

CORPORATE RETURN EXTENSION

Corporate Returns are due March 15th, filing this extension will extend the due date to September 15th

Would you like to file an extension for your **2018** corporate return? YES NO

Corporation Name _____

Owner/President Name _____	Owner/President Signature _____
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CORPORATE RETURN LATE FILING PENALTY

When S corporations fail to file Form 1120S by the due date (or by the extended due date), the IRS minimum penalty of **\$195 for EACH MONTH** (or part of the month) the return is late multiplied by the number of shareholders.

*If filing a Corporate Return extension, you will most likely (or DSA will likely) have to file an extension for your Personal, since your business information must be included on your Personal Return. Remember, you **cannot** file your Personal Tax Return **WITHOUT** your Business Return having been completed and included on your Personal Return (Form 1040).*

PERSONAL RETURN EXTENSION

Personal Returns are due April 15th, filing this extension will extend the due date to October 15th

Would you like to file an extension for your **2018** personal return? YES NO

Taxpayer	Spouse
Full Name _____	Full Name _____
Date of Birth _____	Date of Birth _____
Social Security # _____	Social Security # _____
Phone # _____	Phone # _____
Signature _____	Signature (Spouse) _____

PERSONAL PENALTY - UNPAID PERSONAL TAX FEES & LATE FILING PENALTY

You will owe interest & penalties on any tax not paid by **APRIL 15th**, regardless of filing an extension. Extensions only extend the due date for the return, to avoid a late filing penalty. They **DO NOT** extend the due date of the payment. If you **DO NOT** file an extension and **DO NOT** file your return by **APRIL 15th**, the IRS will charge you a **failure to file** penalty - which is usually 5% of your unpaid tax per each additional month late.