



## GENESIS TAX SERVICE, LLC NEWS YOU CAN USE!

May 2013

**O ... M ... G ...!!** The fact that I'm sending this newsletter at the *end* of the tax session should tell you what a year I've had! Tax season 2013 is going out like a lamb but it sure came in like a lion!

It started with the "fiscal cliff" delays and changes, for which the IRS was not ready (and subsequently neither were software providers or tax preparers). Certain forms couldn't be submitted until the IRS gave the all clear, which for some people was over a month! Then there was a change in the submission process through my software -- which I should have known about ahead of time but didn't (my bad!) -- that required an extra step in submitting state returns. State returns that should have been submitted or "e-filed" at the same time as the federal returns were sitting in my out box because I didn't know I had to go back into the software and submit the state return separately a day *after* the federal was submitted, an extra step and a big change from previous years. So that left folks waiting for their MD returns longer than they should have. Again, my fault and I deeply apologize.

And here's a good one: for 5 years I've told your state returns to "deposit the refund into the same account as the federal refund" (unless you told me differently). Never had a problem before. This year that command inserted a coded bank routing and account number that did not look like it corresponded with your actual account number. So when you guys looked at your state return while wondering where your delayed refund was and saw this odd account number you were understandably perplexed. Callers to both DC and Maryland tax

offices were told that that was *MY* account number and that your refund would be deposited into "my" account and that *I* would be issuing the refunds!! That was soooo incorrect (as well as illegal!) and caused some concern with a few people. Rest assured everyone got their refund that was supposed to get one, and it did not come through me. But that took some "splainin'" to a few folks. It took until early March for things to settle down and begin to go smoothly.

To add insult to all this, my laptop died in October. In purchasing a new bigger and better one, I have found that I am not able to use my tax preparation software from 2009 back, only from 2010 forward (the software is 32 bits, the new computer is 64 bits, something technical to do with that). So unfortunately any tax returns from 2009 or older I am currently unable to access. I've checked with my software provider and they've informed me that there isn't a version of the software for those years that is compatible with the 64 bit computer I now have. I also had to buy both a new laser jet printer as well as an all-in-one color printer/scanner, all of which went haywire at one point or another in the season! Whew! Am I glad this season is officially over or WHAT! ☺

### [REFER-A-FRIEND PROGRAM](#)

And in spite of all this, you guys have blessed me with your referrals and I appreciate it more than you know! I've been blessed with a number of new clients thanks to you. For those of you unfamiliar with the *Refer-a-Friend Program*, for every person you refer to GTS who gets their taxes prepared, you get \$10. The new client will get 10% (or more) off their tax preparation fees. Win-Win situation, right? So if you have been happy with GTS, please

continue to mention me to your family, friends, and co-workers. If you HAVEN'T been happy with my service, please mention it to ME so that I can address your concerns. Look for your checks in the mail within the next couple of weeks. And *please* cash them -- they're real money! Don't hold onto them!! ☺

### NOW AVAILABLE -- PAYPAL!

That's right! Thanks to suggestions from several of you, I am now authorized to accept payments through PayPal! Use my personal email address: [michietbrown@comcast.net](mailto:michietbrown@comcast.net) and click "Payment to Family or Friends." That way I'm not charged a 2.9% fee plus 30¢ per transaction (their suggestion, not mine!). Of course, payment through PayPal is free to you. What a savings for me in credit card fees! Win-Win again!

I am continuing to offer **FEE COLLECT** to those who would prefer no out-of-pocket costs. It's a **FLAT FEE of \$50** (\$15 to Santa Barbara Bank who actually handles the refund and fee and deposits the balance into your bank account, and \$35 processing fee to Genesis Tax Service). This \$50 fee is **in addition** to any tax preparation fees. You will still get your refund in 8-15 days by direct deposit or check. It's quick, easy and available to anyone receiving a refund.

### ADDITIONAL COPIES OF TAX RETURNS

With so many clients refinancing their homes or preparing children for college, I continue to get a lot of requests for copies of previously filed tax returns. As a friendly reminder, *additional copies of your completed tax returns are provided at a cost of \$20.* This information is noted on the bottom of your invoice. This \$20 charge applies whether the extra copy is being mailed, faxed or emailed. To avoid this charge, please keep the hard copy that I provide you in a safe and accessible place.

### WITHHOLDING CALCULATOR

Too many people use the hit-or-miss method of figuring out how much income tax to have withheld from their wages. Well there's a better way. It's called the IRS Withholding Calculator. In a few simple steps you can calculate the accurate amount to have withheld so that you don't have too much or

too little taken out (both of which can be a problem). For more information, check the IRS website at: <http://www.irs.gov/individuals/article/0,,id=96196,00.html?portlet=7> (you may have to cut and paste into your browser).

### THANKS AND GOD BLESS TO THE GREATEST CLIENTS ON THE PLANET!

I am available all year long for questions and tax preparation services. Feel free to contact me at [mbrown@genesistaxsavings.com](mailto:mbrown@genesistaxsavings.com). I am able to respond the fastest via email. Or you can call the **home office** at **301/283-3372** and I will try to return your call within 24 hours. The office **fax** number is **301/283-0798**. Please visit my website at [www.genesistaxsavings.com](http://www.genesistaxsavings.com) for additional information and updates. Have a safe, enjoyable, and blessed summer and I look forward to seeing all of you next year!