

MARK L. SCHMITT, CPA, P.C.

CERTIFIED PUBLIC ACCOUNTANT
CERTIFIED FINANCIAL PLANNER®

Electronic Filing

This year our Firm will provide electronic filing for individual income tax returns. Please follow the instructions on this sheet to have your returns filed electronically.

1. Please make sure that the names and social security numbers of all individuals listed on the return – taxpayer, spouse, and dependents – are an exact match with the names and social security numbers shown on all of your Social Security Cards.

Any variation between the names and social security numbers listed on your return, and the names and social security numbers on file with the Social Security Administration, will delay the acceptance of your electronic filing.

2. Please make sure that the birthdates for all individuals listed on the return – taxpayer, spouse, and dependents – are correct.

Any variation between the birthdates listed on your return, and the birthdates on file with the Social Security Administration, will delay the acceptance of your electronic filing.

3. We will contact you when your individual income tax returns are ready. You will receive the following materials:

One paper copy of your returns for your records, and

Form 8879 authorizing our Firm to submit your returns to the taxing authorities electronically.

Payment for services is required at the time that you receive these materials.

4. After you have reviewed and approved your returns, you must sign and return Form 8879 to our office so that we can submit your returns through electronic filing.

Please note that we must receive your signed Form 8879 by April 6 to initiate the electronic filing process. If we do not receive your signed Form 8879 by that date, your returns will be extended.

5. Within a few days of our electronic submission of your returns, our Firm will receive:

Confirmation that your return has been received electronically, or

Notification that your electronic filing was not successfully received (normally as a result of mismatches listed above).

6. If your electronic filing has been successfully received, we will send your confirmation to you. If your electronic filing was not successfully received, we will contact you for corrected information so that your electronic filing can be re-submitted. If your return is rejected a second time, we will provide paper copies and instructions so that you can submit your return by mail.

If you are required to make any tax payments, we can provide you with a voucher so that you can mail your payment(s) due on or before the filing deadline, April 18, 2011. You may also choose to receive any refunds either through direct deposit or by mail.

ROCK HILL (Main Office)

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