



Tax Time: Put It in Your Schedule

Now is the time to start planning for April 15, 2014 in order to maximize your tax savings. While there are lots of details we can't include here, we wanted to help you get your calendar in order so you'll be able to have a hassle-free tax preparation season. (And, we'll be able to focus more on your return as well.) So, get your Smart Phone out and put these dates on your calendar. We're here to help, even when you head South for a winter vacation!



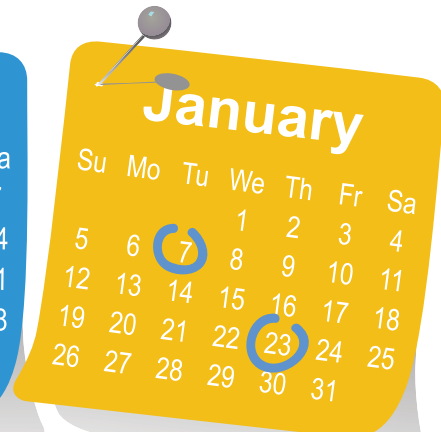
NOVEMBER 1 – Meet with RBF to strategize for 2013 taxes

NOVEMBER 15 – Organize tax files



DECEMBER 17 – Meet with RBF and finalize Tax Estimates for 2013

DECEMBER 31 – New Year's Resolution - Sign up for RBF Portal - become paperless!



JANUARY 7 – Review RBF Tax Organizer Document

JANUARY 23 – Review tax deductions



FEBRUARY 12 – Check for receipt of all source documents 1099s, KIs, Broker Statements, etc.

FEBRUARY 25 – Deliver all information to RBF before going to Florida



MARCH 14 – Tax Information due for guaranteed completion by April 15th

MARCH 15 – Business Tax Return Due Date

MARCH 25 – Check in with RBF upon return from Florida

MARCH 31 – Sign 8879 document which allows RBF to file electronically



APRIL 1 – No Fooling – Tax Info delivered after today will result in an automatic extension

APRIL 15 – Go to bed early Taxes filed electronically

APRIL 30 – File 2013 Tax Returns in safe place

DON'T FORGET!
X Signature Required
8879 forms **must be signed** for electronic filing