

TAX PLANNING AND PREPARATION RESOURCES

My name is Robert D Flach. I have been preparing 1040s for individuals in all walks of life since 1972. I have also been writing the popular tax planning and preparation blog THE WANDERING TAX PRO (<http://wanderingtaxpro.blogspot.com>) since the summer of 2001.

I am the creator and author of the websites –

- THE TAX PROFESSIONAL (<http://thetaxprofessional.webs.com>),
- FIND A TAX PROFESSIONAL (<http://www.findataxprofessional.com>) and
- A TAX PROFESSIONAL FOR TAX REFORM (<http://taxprosfortaxreform-com.webs.com>).

I have been a member of the National Association of Tax Professionals for over 30 years, and often write for the Association's TAXPRO JOURNAL as well as the newsletter of the New Jersey state chapter.

I have created several guides, reports, and newsletters on tax planning and preparation for the average taxpayer. These products are identified in this catalog.

These products include forms, schedules, and worksheets that you will find helpful in keeping track of and reporting information needed to prepare your tax returns. Please be advised that ***the forms, schedules, and worksheets contained in the guides, reports, and newsletters described below are copyrighted material and for your personal use only.***

ROBERT D FLACH'S TAX INSIGHTS

A quarterly newsletter of ROBERT D FLACH'S TAX INSIGHTS.

In it I discuss in detail ways and means to allow you to pay the absolute least amount of federal income tax legally possible, and provide helpful forms, schedules, worksheets and other resources.

I will also explain in detail, with tax planning recommendations, all new tax legislation. It is expected that Congress will pass substantive tax reform legislation that will affect all taxpayers in 2017.

This newsletter is not written for the "wealthy" – but for the average middle to upper-middle class taxpayer.

As an example of what will be covered in issues of TAX INSIGHTS, in the premiere issue – January 2017 - I discuss:

- ✓ STARTING THE YEAR OFF RIGHT
- ✓ KEEPING TRACK OF YOUR CHARITABLE CONTRIBUTIONS
- ✓ INFORMATION RETURNS
- ✓ DEDUCTING MORTGAGE INTEREST
- ✓ KEEPING TRACK OF INVESTMENT COST BASIS

I also offer some TAX PLANNING INSIGHTS and end with some FINAL ADVICE FOR PREPARING YOUR 2016 TAX RETURN. The issue includes two special worksheets for subscribers to use to keep proper separate track of acquisition debt and home equity debt, along with a detailed example of how to use these worksheets.

The cost of a one year (4 issue) subscription to ROBERT D FLACH'S TAX INSIGHTS is only \$7.95 delivered as a "pdf" email attachment. A print version sent via postal mail is available for \$13.95.

ROBERT D FLACH'S GUIDE TO ITEMIZED DEDUCTIONS: ALMOST EVERYTHING YOU WANTED TO KNOW ABOUT SCHEDULE A

A comprehensive explanation of just about everything you every wanted to know about claiming itemized deductions on Schedule A.

This valuable guide discusses in detail the deductions for –

- ✓ MEDICAL AND EXPENSES
- ✓ TAXES YOU PAID
- ✓ INTEREST YOU PAID
- ✓ GIFTS TO CHARITY
- ✓ CASUALTY AND THEFT LOSSES
- ✓ JOB EXPENSES AND CERTAIN MISCELLANEOUS DEDUCTIONS
- ✓ OTHER MISCELLANEOUS DEDUCTIONS

I also explain –

- ✓ ITEMIZING WHEN DEDUCTIONS ARE LESS THAN THE STANDARD DEDUCTION
- ✓ SEPARATE RETURNS
- ✓ RECORDKEEPING
- ✓ THE ALTERNATIVE MINIMUM TAX
- ✓ YEAR-END TAX PLANNING FOR ITEMIZED DEDUCTIONS

This guide is a must for all taxpayers who itemize, or who should be itemizing. Even if you use a tax professional to prepare your returns, the more you know about what you can deduct and what records to keep the more organized you will be at tax time, and the less likely you are to miss any deductions to which you are legally entitled.

The cost of this comprehensive guide is only \$8.95 delivered as a pdf email attachment.

TAX GUIDE FOR NEW HOMEOWNERS

A detailed discussion of the special tax benefits available to homeowners, including -

- itemized deductions for real estate taxes, mortgage interest, refinancing, and points,
- the home office deduction,
- rental income and deductions for a 2-family home,
- the home sale exclusion, and
- Alternative Minimum Tax issues.

This guide also contains sections on "Choosing A Tax Professional" and "What's New In Taxes for 2016" and special worksheets, with detailed instructions, on how to keep track of the different types of mortgage interest.

The cost of this valuable resource is only \$7.95! The guide will be sent to you as a pdf email attachment. A print edition sent via postal mail is also available for \$9.95.

AN INTRODUCTION TO SELF-EMPLOYMENT: THE BASICS OF SCHEDULE C

An extensive "must-have" guide for the newly self-employed sole proprietor who will be reporting business income and expenses on Schedule C, and a good source of information and advice for the already existing business.

It explains such important topics as –

- ✓ THE NEED FOR A SEPARATE CHECKBOOK FOR YOUR BUSINESS
- ✓ FORMING AN LLC
- ✓ BOOKKEEPING
- ✓ THE SELF-EMPLOYMENT TAX
- ✓ ESTIMATED TAXES
- ✓ SELF-EMPLOYMENT RETIREMENT PLANS
- ✓ DEDUCTIBLE BUSINESS EXPENSES
- ✓ THE HOME OFFICE
- ✓ THE SELF-EMPLOYED HEALTH INSURANCE DEDUCTION
- ✓ GOOD RECORDKEEPING
- ✓ PUTTING YOUR KIDS ON THE PAYROLL
- ✓ TAKING A TAX-DEDUCTIBLE VACATION

It also identifies some common bad advice and includes a compilation of online resources for the self-employed and useful forms, schedules, and worksheets for use by the sole-proprietor.

The cost of this invaluable guide is only \$8.95 delivered as a pdf email attachment. A print copy sent via postal mail is available for \$11.95.

[THE NJ-1040 LETTER](#)

Most NJ taxpayers concentrate on their federal tax return and spend minimal time on their NJ return, simply taking numbers from the 1040 and putting them on the NJ-1040. As a result they are paying more NJ state tax than necessary, often paying tax on income that is not even taxed by NJ.

By becoming informed on NJ state tax law and using proper tax planning you can make sure that you pay **the absolute least amount of NJ Gross Income Tax possible for your particular situation.**

I have been preparing NJ-1040s for as long as there has been a NJ-1040, and federal income tax returns for even longer. I have created a newsletter titled THE NJ-1040 LETTER to share my knowledge and experience from over 40 years as a professional tax preparer to help you experience the joy of avoiding NJ state taxes.

Published 6 times a year (January, February, March, April, July, and October), each issue will contain valuable NJ state tax-saving advice and information, updates on NJ state tax law, NJDOT rules and regulations, court cases, and the special NJ property tax relief programs, and links to online resources to help you in planning for an preparing your NJ-1040. Also included in each issue will be special forms, schedules, and worksheets to help you during the year and at tax time. *This is the only publication that I am aware of that deals exclusively with tax planning and preparation advice for the NJ-1040.*

A one-year subscription to THE NJ-1040 LETTER delivered as a pdf email attachment is only \$11.95. A print edition sent via postal mail is also available for \$24.95.

Subscribers will be offered special discounts on other tax-saving reports throughout the year.

You can download a free copy of the premiere July 2016 issue by clicking [here](#).

TAX PLANNING AND PREPARATION RESOURCES ORDER FORM

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