



**Issue #19**

**May 2015**

SASS ACCOUNTING, LLC  
221 E. Green Bay Avenue  
Saukville, WI 53080  
262-235-4250  
[www.sassaccounting.com](http://www.sassaccounting.com)



**Dear Client**

Welcome to our 19th edition of our quarterly newsletter. We hope you find these to be informative and useful. We have reviewed our records and made every attempt to ensure that we have used the correct email address for you. If however, you have received duplicates or prefer to have this newsletter delivered to a different email address, please let us know.

**In this Issue**

**Identify Verification Quiz**

**Important and Helpful Links**

**Laurie in the News**

**Estate Tax Portability Election Information**



[Laurie Ziegler](#)  
[EA ProAdvisor](#)



[Energy Star Tax Credits Information](#)

**Quick Links**

[IRS - Internal Revenue Service](#)

[State of Wisconsin Dept. of Revenue](#)

---

*Thank you!*



We would like to thank our clients for another successful tax season. We appreciate all of the new clients you have referred to us. Thank you for your loyalty.

For our clients who filed an extension for their taxes, the deadline for Partnership and Corporation returns is September 15, 2015. Appointments must be made or all information must be dropped off BEFORE September 1, 2015 to avoid a late fee of \$40.00. The deadline for Personal Returns is October 15, 2015. Appointments must be made or all information must be dropped off BEFORE October 1, 2015 to avoid a late fee of \$40.00.

## **Identity Verification Quiz Combats Identify Theft and Tax Fraud**

Beginning January 2014, the Wisconsin Department of Revenue, in an effort to combat identity theft and tax fraud, implemented an extra tool called Identity Verification Quiz. This tool requires some taxpayers and/or Homestead claimants to take an identity "quiz" online or via phone, or to send in documentation proving one's identity.



If you are selected to take the quiz, your Wisconsin return will not be processed until you complete the Identity Verification process. You will receive a letter from the Wisconsin Department of Revenue and should respond immediately in order to expedite the processing of your refund.

If you are selected for Identity Verification, you will need the following:

1. The letter from the Wisconsin Department of Revenue - there is a Letter Identification Number that you will be required to provide to begin the process.
2. The last four digits of your Social Security Number.
3. You will be asked four multiple choice questions. The answers will help verify your identity. You will be informed immediately whether or not you passed the quiz. Once the quiz is successfully completed, no further action is needed.

We had several clients that received these letters. It is NOT spam. Ignoring it will delay your refund.

IF YOU HAVE ADDITIONAL QUESTIONS OR NEED ASSISTANCE, PLEASE CONTACT OUR OFFICE.

## Important and Helpful Links

Here is some additional information for you to review - just click on the topic below.

We would like to remind you that the IRS will NEVER call you, all correspondence will be through the mail.



[IRS “Dirty Dozen” List of Tax Scams for the 2015 Filing Season](#)

Here is an article that talks about [IRS Notices and How to Avoid Scammers](#).

[6 Reasons Your Tax Return Might Get Audited](#)

[IRS Get Transcript App](#) - An easy way to print or download your IRS transcripts

[WI Revenue Mobile App](#) - A quick way to check your estimated tax payment status, refund status and more.

Affordable Health Care Act & Insurance - [sign up here](#)

[Free Electronic Donation Tracking](#) - An easy way to keep track of donations throughout the year

[Tips For Charitable Contributions](#)

Trip Cubby Mileage Log - An easy way to track your mileage. (available in the [iTunes App store](#))

## Laurie in the News!



Recently Laurie was quoted in an article by Bankrate.com about tax refunds versus bigger paychecks. You can read more here:

<http://www.bankrate.com/finance/consumer-index/money-pulse-0315.aspx>

Earlier this month Laurie made her annual trip to Washington DC, to speak to members of the House Ways & Means and Senate Finance Committees regarding tax issues that affect clients. On May 15, 2015 Laurie was installed as Secretary/Treasurer for the National Association of Enrolled Agents (NAEA) Board of Directors. This will be Laurie's fourth year on the board.

## Estate Tax Portability Election News

The executor of estates of decedents dying in 2011 or later can make a portability election. This permits the executor of an estate to effectively carry over any unused estate tax exemption to the decedent's surviving spouse. The election is only useful if the decedent's estate does not exceed the estate tax exclusion (\$5,000,000 as indexed). Originally the portability election was beneficial only if the surviving spouse also died on or before December 31, 2012, but this date was removed and the election is effective permanently. If you have any questions you should contact our office or the person handling the estate.



*We hope you are enjoying the Sass Accounting newsletter. Don't forget to check us out on the web at [www.sassaccounting.com](http://www.sassaccounting.com) and find us on [Facebook](#) so you can stay up-to-date. Please feel free to forward this to your family and friends.*

*We look forward to continuing to assist you with your accounting and tax needs, as well as any questions or concerns you may have. Have a wonderful Spring and Summer!*



**Share This  
newsletter**

*Simply click the link above and send a blank email from your email account. You will get a confirmation email in reply.*

Laurie Ziegler, 221 E Green Bay Avenue, Saukville, WI 530802006, United States

You may [unsubscribe](#) or [change your contact details](#) at any time.