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Mark S. Varshawsky & Associates

Certified Public Accountants

Dear Client:

Yes, this is my second Newsletter in a week, but the new tax law has provided us with another new surprise.

URGENT AND IMPORTANT:

For those who converted traditional IRAs to ROTH IRAs in 2017.

The new Tax Bill DOES NOT ALLOW you to re-characterize your 2017 conversions after DECEMBER 31, 2017 (Before the new law you had until October 15 to make the final decision).

Although I believe there will be a correcting legislation in 2018, I recommend the following action:

- Make every attempt to re-characterize any conversions that you ARE NOT definitely keeping and paying for on your 2017 tax return. Please contact your financial advisor to re-characterize.
- If logistically you are not able to complete the re-characterization, then I believe I would prevail if this issue is audited by the IRS.
- For 2018, I recommend that you do not do any traditional IRA to ROTH conversions until we have done proper tax planning.

I will be in the office this week, however I am still working on 2017 year-end tax planning and will have limited availability by phone. Please email me with any questions you may have (Mark@msvcpa.com) and I will do my best to respond.

Thank you and Happy New Year!

Mark

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