



Dear Client,

I hope this letter finds you and your loved ones healthy and safe. As we prepare for the 2023 tax filing season, our goal is to continue to deliver excellent tax planning & preparation service. This correspondence (whether electronically or by mail) is being provided to assist you in preparing for the preparation of your 2023 tax return(s).

IMPORTANT DATES FOR 2023 TAX SEASON

- The tax deadline for the 2023 filing season is April 15, 2024. Our electronic filing deadline will be Wednesday, April 10, 2024 as there is not sufficient time after this date to guarantee acceptance of your return(s) by the government agencies prior to the tax deadline. We will continue to e- file after this date, but cannot guarantee acceptance by the IRS prior to the April 15th deadline.
- We must receive your completed tax information by Monday, March 25, 2024 in order to guarantee completion of your return by April 15, 2024. If we receive your information after this date, we cannot guarantee that your return will be completed by the filing deadline. As such, an extension will automatically be filed.

Please note that the IRS is continuing to work “in crisis” mode as has been the case since the 2019 filing season. Due to this, if the preparation of your return requires confirmation of information by the IRS, there will be delays as reaching the IRS by phone has required numerous weeks to reach an agent.

TAX ORGANIZER

A comprehensive Tax Organizer is available upon request but is not mandatory as its purpose is to help you organize your information for the purpose of the preparation of your return. Although there are several circumstances that make it more useful than others. Examples include clients who:

- Are self-employed
- Own rental property or have other rental income
- Operate a farm

Please provide the first page with your tax documents to provide updated changes in your contact information or dependents.

SECURITY

We take security seriously. Please upload documents that include sensitive information, such as social security number, to your Citrix Sharefile folder. If you no longer have access or have lost your invitation to your portal, please let me know so that we can resend this for access.

SUPPORTING DOCUMENTATION

Please understand all client files submitted with missing information are placed on hold and the tax return preparation process will not begin until the file is 100% complete. Please reply promptly to avoid delays in your returns being completed if we contact you for missing information and/or documents.

- If you have a few missing items, we encourage you to send in what you have so we can begin preparing your return. Understandably, some items/documentation may be missing initially, however you may send those in as soon as you receive them.
- Please provide us with the following supporting documentation, as it pertains to your tax situation:
 - Form(s) W-2 (wages, etc.)
 - Form (s) 1099 (interest, dividends etc.)
 - Schedule(s) K-1 (income/loss from partnerships, S-corporations etc.)
 - Form(s) 1098 (mortgage interest) and property tax statements
 - Brokerage statements from stocks, bonds or other investment transactions
 - Closing statements pertaining to real estate transactions
 - All other supporting documents, if necessary (schedules, checkbooks etc.)
 - Any notices received from the IRS or other taxing authorities
 - Schedule of all estimated payments that you made during the year

IRS REGULATIONS THAT MAY AFFECT YOUR RETURN

- If you have signatory authority on a foreign bank account: You must inform us if you hold any type of foreign assets, including bank or securities accounts. There are severe penalties for failure to report these accounts on your tax return.

PAYMENT

As in previous years, invoice payment is due upon the preparation of your completed tax return(s). We submit the electronic files to the IRS and State(s) upon receipt of signed e-file authorization forms, engagement letter and full payment. Due to remote processing, I accept the following forms of payment: Zelle, Venmo, ACH and credit card. Please note that payment via credit card will incur a processing fee.

We sincerely thank you for your business and we look forward to hearing from you soon. Wishing you and yours, health, happiness, and peace in 2024.

Victoria Otto

