**A MUST READ FOR ALL TAX CLIENTS**

**IMPORTANT INFORMATION**

**TAX YEAR 2023**

(For returns prepared during 2024)

**To all tax clients:**

It is a privilege for us to be your tax preparer of choice again this year. There have been major changes implemented by Congress and the IRS that will impact the preparation of 2023 tax returns.

Recordkeeping Compliance:

In order for us to comply with IRS regulations, it is necessary that **all** tax clients complete our tax organizer, even if you are a previous client, and sign it. **Both** husband and wife must sign the organizer if you are filing a joint tax return. We **cannot** prepare your tax return until we have the **signed organizer and a copy of the driver’s license for each person listed on the tax return** in our office. This requirement is for both those who mail in their information and for those who come in for appointments.

Receipt Requirements:

It is always necessary that you have and retain IRS acceptable receipts for all tax deductions that you are claiming. If you do not have receipts, we cannot use your deduction on your tax return. If you are not sure if a receipt is acceptable, please ask us. If you are not sure if an item is deductible, please ask us. We cannot use approximate numbers or guesses. We must have actual amounts that can be verified by legitimate receipts in order to claim your deduction. We will ask to see your receipts to verify your deductions, but we do not keep your receipts or copies of them in our office. You must retain these records in case you are questioned by the IRS.

Mandatory E-Filing:

All tax preparers who file 10 or more tax returns are now required to efile their clients’ tax returns. If you do not wish to have your tax return efiled, you must sign an “Opt Out Form” and give it to us when you give us your organizer. Without this completed, signed form, we will be required to efile your return.

Filing Deadlines:

We have a good problem. Our client base is expanding rapidly. Last year we served over 1,500 tax clients in 44 states. Due to this growth we must implement the following changes. We cannot prepare large volumes of last minute tax returns and meet filing deadlines. We are asking that you not wait until April to get your tax info. to us. We cannot guarantee that any taxes received after **April 1** will be able to be filed by the April 18 deadline. Late filers may also be subject to higher tax preparation charges.

Extensions:

If you wish us to file an extension of the time to file your taxes, please notify us by April 11. Remember this is an extension of time to file your taxes not an extension of time to pay your taxes. Filing an extension will add $ 25. to our preparation fee

Billing and Payments:

Due to new imposed IRS requirements placed upon all tax preparers, there will be an increase in our fees for tax preparation. We will keep the increase as small as possible. All payments for our services are due when you receive your completed tax return. Please do not delay your payment! All accounts 30 days past due will be subject to a $ 10./month late fee for each month it is late. We do accept credit card payments over the phone. Credit card payments will be subject to a 3.5% convenience fee.

Letters from Tax Agencies:

If you receive a letter from any tax agency saying there is a problem with your tax return, please contact us. These letters are rarely correct. If we made a mistake, we will correct it free of charge. If the letter is incorrect or if you have provided incorrect info., we will charge a fee to deal with the issue.

The Affordable Care Act:

Be sure to complete the Healthcare Coverage section of our organizer. It is information that we are required to have for your tax return without it we cannot process your tax return.

**Please!!!!! Please!!!! Please!!!!**

Do not send us your information until you have collected it all. We do not have room to store partial info. files. **Be sure to download, complete, and sign our tax organizer. Follow the instructions completely. Without a signed organizer we will not begin to process your tax return.**  **New this year -We need your email address**. Thank you for your trust and confidence in our services!