

READ ME!!

Hello Friends!

January 19, 2024

Happy New Year! We're looking forward to serving you this year. Tax season is intense, but the biggest challenge is when well-meaning clients book an appointment when they're not quite ready resulting in a *punch list* of missing items and documents that trickle in. This leads to inefficiencies and susceptibility to errors. Please keep this in mind *before* you schedule your appointment. 🙏

RATES: Our fee schedule is the same as last year and published on our [website](#).

TAX PREP APPOINTMENTS: Barbara, office manager, will begin scheduling appointments on Monday, Jan 22nd. The first available appointment is Thursday, February 1st. You have a few options: Face-to-face, drop off, phone.

**** Scheduling is the only way we can regulate the pace and workload during tax season. In other words, simply uploading your tax documents to the portal WILL NOT add you to the queue for tax preparation.**

TAX DROP-OFF & DEADLINES: To combat our demanding tax season, we strictly adhere to the deadline schedule in the table below. You may count on ONE reminder email from us as deadlines approach. As always, we are happy to file an extension for you.

TAX RETURNS	Document Deadline	Filing Deadline
S-Corp & Partnership	February 29 th (Tuesday)	March 15 th
Individual (1040)	March 29 th (Friday)	April 15 th
EXTENDED RETURNS		
Corporate & Partnership	August 30 th (Friday)	September 16 th
Individual (1040)	September 30 th (Monday)	October 15 th

FIRST COME, FIRST SERVED: If you wish to file by April 15th, make your appointment ASAP because once appointment slots are filled, all other returns will go on extension. **We see clients on Tuesdays, Thursdays, and Fridays.** The office will be **CLOSED** (NO walk-ins) on Mondays and Wednesdays for uninterrupted tax preparation. **We will not accept any tax preparation appointments after Friday, March 29th.** However, we will gladly extend your return, and resume tax preparation appointments on May 1st.

PORTAL: The portal is not designed for permanent storage; **all tax records sent to and from the portal expire (fall out) after six months.** In other words, you need to personally and safely store your own tax returns and records.

ENERGY EFFICIENT HOME IMPROVEMENT: Because of [favorable changes to this tax credit](#), please bring receipts for any energy efficient home improvements such as: windows, exterior doors, HVAC, insulation, hot water heater.

VIRTUAL/CRYPTO CURRENCY: To minimize our fee for reporting your virtual currency activity, we will insist that you download BOTH **Form 8949** and **.csv transaction report** from the platform(s) you use.

2023 ORGANIZER: Upon request only, we will send your personal organizer to your portal.

FEE if UNPREPARED or DISORGANIZED: Repeated document requests, documents that trickle in, records that are not organized, summarized, and tabulated, may result in an additional fee.

WAIT LIST: We are honored by your referrals and when we are able to accept new clients, we will let you know.

CLOSING REMARKS: When we can offer your "quick question" a "quick answer", we are pleased to do that and at no charge. However, often you are best served when you book a one-on-one tax consult. The best time to tax plan is not during the throes of tax season.