

January 2023

**Dear Tax Client:**

Happy New Year!! As 2023 starts off my thoughts naturally turn to the upcoming tax filing season and assisting you with the filing of your tax returns. This year there are lots of changes: mileage deductions, pension funding, pension withdrawals, child tax credits and charitable donations just to name a few. This year resulted in retirements of many long-time colleagues, reduction in number of clients served by other tax practices and significant increases in business costs. As a result, it will be a busy year for those of us still preparing tax returns and costlier for professional services.

For tax season, I will be working with only the aid of my canine companions Daisy & Stella, so I appreciate your understanding that to achieve my goal of staying healthy (physically and mentally), my accessibility must be limited.

**➤ SAFETY:**

- There will be **no entry** allowed into my office for **ANY unscheduled (drop-in) visitors**. If you don't have a prescheduled appointment, you should not expect to be allowed entry. While I love visiting and catching up with each of you, unfortunately, my schedule just can't handle multiple interruptions throughout very busy tax season days.

**➤ DELIVERY OF INFORMATION TO BETH:**

- Use of electronic client portal via <https://bethkissingercpa.securefilepro.com> is available 24/7. This is the safest electronic method to send your documents to me through the internet
  - Advance set up is not required – use the guest access area
    - If you used this portal previously, you can still access your account, if you cannot remember your user name or password, please use the guest access area
  - **DO NOT** text or send your confidential information through regular email – it is not secure
- All my questionnaires, checkoff lists, forms, etc. **MUST be completed and returned** with your tax documents or your returns will NOT be started
- A new **HUGE** Locking Drop box at the office is available 24/7
  - No need to call ahead to ask if you can drop off your info, just place it in the drop box
  - Boxes are emptied regularly throughout the day and there is an anti-theft drop feature
- US Mail or any other delivery service can be used to send your information to me
- Remove all tax documents from the envelopes they were mailed to you in and keep the envelope – Do not staple documents together, using paperclips is fine
- Provide the bulk of your information early, I will input what you have and then we will finalize your return when the final form arrives. Waiting to drop off all your information at once in mid to late March **is not advisable** and will likely result in the need to file an extension.

**➤ DELIVERY OF COMPLETED TAX RETURNS:**

- Completed returns will be mailed via USPS with tracking
- Electronic copies can be posted to your client portal (for anytime retrieval)

**➤ ITEMS TO KEEP IN MIND:**

- **Tax filing due date is Tuesday, April 18, 2023**
- While the standard deduction is typically used on federal returns, there is a lower state threshold, so providing all your itemized deduction information is the safest way for me to determine if those expenses can lower overall income tax exposure

➤ **ITEMS TO KEEP IN MIND:** (Continued)

- In an effort to keep steady with inflation, new filing and reconciliation requirements, my fees will be increasing. Additional charges will be incurred for service requests including but not limited to: 2023 tax planning, estimated tax calculations, IRA/HSA/ retirement funding savings calculations, responding to emails, appointments, missed appointments, accounting services, postage, requests for last minute tax services and extension preparation.
- I handle all returns on a first come first served basis. If you are unable to provide your information by March 10, 2023 an extension may be necessary and a premium fee for my services should be expected.

Remember, failure to timely provide all the information requested, and/or failure to complete the **ENTIRE** questionnaire and **ALL** worksheets provided, will delay the processing of your returns, result in a higher preparation fee and may result in missed deductions, higher income taxes, penalties and interest. Please help me to do an efficient job for you as painlessly as possible.

I am looking forward to assisting you in 2023. I would be happy to discuss any item of concern or interest you may have pertaining to the current or proposed tax laws, or any of the information in the enclosed package. Best wishes for a happy, healthy and prosperous 2023!!

Sincerely,

*Beth*

Beth Kissinger  
Certified Public Accountant

## HOW TO MAKE TAX PREP EASIER FOR MY PREPARER:

- Provide your information prior to March 1
- Remove all documents from envelopes and provide only the contents (no envelopes)
- Do not staple documents together (Removing all staples is best!)
- Group like documents together (1099s, W2 forms, etc.) paperclips are fine – do not staple
- Provide every page of multipage forms you receive – such as:
  - 1099 consolidated packages (even if pages in the sequence are blank, include them)
  - K-1 forms received from your investments
  - Allocation of state exempt earnings & foreign income summaries (Often these are included in the year end 1099-DIV packet)
- Do **not** cut apart your bank statements to provide proof of your deduction, but rather provide the full bank statement page that includes proof of the payment.
- If you plan to itemize deductions and have made charitable contributions, please provide a listing of your charitable donations showing the date paid, method of payment and amount donated. Totaling the list is helpful.
- Fill out completely all requested questions and paperwork from me by answering all questions asked fully and to the best of your ability. If something doesn't apply to you, mark it N/A
- When contacted by me with questions as I prepare your returns, please respond as swiftly as possible to all voice mails and emails received from me. If resolving the question will take extra time, please let me know you are working on it
- Provide all direct deposit and ACH tax payment information **at the start of the tax prep process**
- Write notes to me on a separate page you provide with your data and **do not assume** I will remember a conversation from months prior to your services being provided
- It is not necessary to call to inquire as to whether you can drop off something in the drop box – the drop box is available 24/7
- It is not necessary to call to inform me that you have just dropped something off in the drop box unless the box will not accommodate your package of information
- Confirm that the receipts you are providing were paid during 2022 (especially for property taxes)