# HOW TO MAKE TAX PREP EASIER FOR MY PREPARER:

- Provide your information prior to March 1 to secure your spot in my schedule
- 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 requested.
- 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 2023 (especially for property taxes)

# BETH KISSINGER, CPA

## 2023 TAX PREP - IMPORTANT INFORMATION

- **PROVIDING YOUR TAX INFORMATION IS EASY**
  - I accept tax information by: Secure Portal, US Mail, UPS, FedEx, and drop off to my lock box only – Sorry, no in person unscheduled visits allowed
  - Drop off is available via two (2) clearly marked, locked, drop boxes on the exterior of the building, right near my front entrance door (left & right side). A **HUGE locking box** is available to accommodate oversize packages and boxes
  - Get your information to me <u>as early as possible</u>
    - ALL forms and questionnaires <u>from me</u> must be completely filled out and returned with your information **– NO work will begin until these forms are returned completed**
      - **All worksheets to complete are located on my website Bethkcpa.com**
    - Do not delay if only missing a 1099, brokerage statement, or an item or two
      - Provide your other information and include a note stating you are missing info
      - It is likely that final, correct information from brokers may not be received until mid to late March. **DO NOT wait** for that last updated form to provide your information to me.
    - Your returns will **NOT** be finalized until any issues are resolved to our mutual satisfaction

  - **ITEMS TO PROVIDE:**
    - Forms: W-2, 1099 (all pages), 1098, 5498, K-1, property tax receipts, estimated tax payment proof, charitable donation proof, HSA funding & withdrawal proof
    - **Do NOT submit your medical receipts**, merely provide the total spent, by category, in the organizer
    - Copy of driver's license for taxpayer and spouse if the license has a date of issue in either 2023 or 2024 and/or if not previously provided to me (**new clients must provide**)
    - Voided check from account when direct deposit or ACH payment is even potentially desired

- **ADDITIONAL TAX DUE WITH YOUR RETURNS?**
  - All returns electronically filed before April 15 can wait until April 15 **to pay any tax due**
  - Tax due can be paid with a check or via ACH deduction from your account
    - ACH payments **<u>can be scheduled</u>** for any time up to April 15, 2024

- **APPOINTMENTS, DROP OFF AND MEETINGS**
  - A limited number of pre-scheduled in person appointments will be available for 2024
    - **No walk-ins will be accommodated or allowed entry**
    - Please mail or drop off your information and include a note detailing anything you may want my extra attention focused on.
    - We will communicate about any issues that arise as I am working on your data
  - Mailed and dropped off returns are immediately put into the processing queue.

- **DEADLINE FOR INFORMATION**
  - All information in my office by March 1, 2024 secures your spot in my schedule
  - Returns are completed on a first come, first served basis
  - My fees increase weekly after March 10, 2024 and there is no guarantee of completion by 4/15/24
  - Extensions may be necessary, and work may be turned away for those who: have late arriving data and/or incomplete questionnaires, are uncooperative and/or unresponsive to requests.

- **EXTENSIONS** are available at an extra fee and may be required for late arriving information

- **COOPERATION** - Your prompt response to my inquiries and requests for further information is expected