

January 2024

Dear Tax Client:

Happy New Year!! As 2024 starts off my thoughts naturally turn to the upcoming tax filing season and assisting you with the filing of your tax returns.

For tax season, I will be working with only the aid of my canine companions Daisy & Stella & Doggie Paddle for Veterans foster dog, Rainy, 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 **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 and/or my inability to accommodate you.

➤ DELIVERY OF COMPLETED TAX RETURNS:

- Completed returns and any original information provided 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 Monday, April 15, 2024**
- 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, ever changing federal and state filing and reconciliation requirements, you should expect my fees will be higher than last year. Additional charges will be incurred for service requests including but not limited to: 2024 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 all of your information prior to March 10, 2024 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 2024. 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 2024!!

Sincerely,

Beth

Beth Kissinger
Certified Public Accountant