

Cooper Sage Financial
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It's that time of year again! As you prepare to have your 2023 income taxes completed, **please take time to read** through this letter as there are few things to remember to ensure your tax preparation goes smoothly.

As in prior years, we will need a copy of your driver's license(s). To make certain that your tax preparation is accurate please go to our website at www.coopersage.com to print and fill out a Tax Organizer. The Tax Organizer can be used to remind you of the information needed to prepare your return and the ability to note any changes over the prior year such as tax status, dependents, address, phone numbers, banking information (for direct deposit), and employment. You do not have to fill out the entire organizer, however the first 4 pages are extremely helpful to ensure accuracy. If you do not have access to a computer, please call to have one mailed or you can pick one up at our office. Please note, upon completion of your income tax return will not be filed until the e-file authorization forms are signed and payment is received. We have worked hard to keep our costs down. Per NYS regulations tax preparers must post within the office the price of tax return schedules/per form. Note, this will be reflected in our new pricing.

In 2017 congress passed the Tax Cuts and Jobs Act (TCJA). This legislation reduced taxes for many households. However, without further legislative action, the tax cuts are set to expire at the end of 2025 and by 2026 tax rates and tax brackets will be higher for most households. Planning for the TCJA expiration to reduce your future tax expenditures is key, please call our office to schedule a complimentary financial/tax review.

Cooper Sage Financial is not just a tax preparation office. We offer many additional services to help you obtain your financial security, financial coaching with Nicole Kobziewich to get out of debt, and protection for your family members as well as assistance with what to do when a loved one passes. If you are interested in learning more about these services, please call our office for more information.

We appreciate your business and look forward to seeing you soon!

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