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Happy New Year, Here we go again !!!

There weren't many monumental changes to the tax laws this year, but some subtle changes did happen. There are lots of new energy credits available for 2023 and 2024 and some of those credits are quite complicated.

Our hope is to help answer your questions and provide ideas on ways to save taxes and money.

Please know that we appreciate your patronage.

The IRS continues to be understaffed and many employees lack experience. The IRS technology and computer systems are improving albeit slowly. Backlogs of unprocessed returns continues to hamper operations and taxpayer communication.

There are 3 ways to exchange information with us:

- 1) In person at our office
- 2) By email from our website file transfer system. (More info on our web site)
- 3) By regular mail (USPS) We do a lot of work by mail, and while not the most convenient, it can work pretty well.

Please remember we have Convenient Parking for our clients on the north side of our building, the "Old Town Center" in Wichita's Historic "Old Town". Our office is on the 2nd floor, northeast corner of First (one way east) and Mead, just east of the main downtown railroad tracks. The entrance to our building is on Mead street.

Our scheduled tax season office hours will be:

Monday through Friday	9:00 to 5:00 (Closed for lunch 12:00 to 1:00)
Saturday	9:00 to 3:00

If these hours are not convenient, call or text and we can make other arrangements. At certain times the outside entrance to the building is locked, just call and we'll let you in.

Please contact us by April 1st if possible. The ***due date*** is ***Monday, April 15***. We are enclosing our worksheet for you to use as you see fit. It works pretty well for a lot of people, even if not perfect for everybody. Just fill it in or use it as a guide.

Jayna, Cathy, Monica and I look forward to seeing you soon.

JAMES F ROGERS CPA PA CLIENT WORKSHEET

2023

TAXPAYER

SPOUSE

Name _____

Soc Sec # _____

Occupation _____

Birth Date _____

Best Phone # _____

E Mail Address _____

Street Address _____

City, St, Zip _____

**Note: Names and SSN's must match
Social Security Admin records**

Dependents: Full Name Birth Date Soc Sec

1	_____	_____	_____
2	_____	_____	_____
3	_____	_____	_____
4	_____	_____	_____

Estimated Tax Payments:

	Payment #	Date Due	Date Paid	Amount	Date Paid	Amount
		Overpayment from 2022		_____		_____
	1	4/18/23	_____	_____	_____	_____
	2	6/15/23	_____	_____	_____	_____
	3	9/15/23	_____	_____	_____	_____
	4	1/15/24	_____	_____	_____	_____

Income: (Please enclose 1099's & W-2's)

	<u>Taxpayer</u>	<u>Spouse</u>
Wages	_____	_____
Pensions	_____	_____
IRA Distributions	_____	_____
State Tax Refunds	_____	_____
Alimony Received	_____	_____
Unemployment Compensation	_____	_____
Social Security Benefits	_____	_____
Other? _____	_____	_____

Adjustments to Income:

	<u>Taxpayer</u>	Date	<u>Spouse</u>	Date
Alimony Paid: SSN _____	_____		_____	
Penalty, Early W/D Savings	_____		_____	
Student Loan Interest	_____		_____	
Teacher Classroom Exps	_____		_____	
Keogh, SEP or Simple	_____	_____	_____	_____
Roth IRA	_____	_____	_____	_____
Traditional (Regular) IRA	_____	_____	_____	_____
Other? _____	_____		_____	
_____	_____		_____	

----- **Interest Received** -----

From:	(Please enclose 1099's)	Amount
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

----- **Dividends Received** -----

From:	(Please enclose 1099's)	Amount
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Sale of Stocks, Securities and Other Investments: (Please enclose 1099's)

Description	Date Acq	Date Sold	Sale Price	Cost Basis	Gain(Loss)
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

Itemized Deductions:

Medical Expenses

Medical Insurance	_____
Long Term Care Insurance	_____
Prescription Drugs & Medicine	_____
Eyeglasses	_____
Doctors, Dentists	_____
Hospitals & Labs	_____
Other? _____	_____
Insur. Reimbursements Recd?	_____
Medical Miles	_____

Interest Paid (Please enclose 1098's)

Home Mortgage: First	_____
Home Mortgage: Second	_____
Investment Interest	_____
Other? _____	_____

Charitable Contributions

Churches	_____
Charitable Organizations	_____
Other? _____	_____
Non-Cash? _____	_____
Volunteer Miles Driven	_____

Taxes Paid

Real Estate	_____
Personal Property (Autos etc)	_____
2022 State Tax Paid in 2023	_____
Other? _____	_____
Sales Taxes (Major Purchases)	_____

**** Please Note: It is now possible to itemize for Kansas even if you cannot on the Federal.**

Tax Credits:

Child & Dependent Care

	Paid to	Address	ID Number	Amount
Child 1 _____	_____	_____	_____	_____
Child 2 _____	_____	_____	_____	_____
Child 3 _____	_____	_____	_____	_____

Education Credits

(please enclose 1098-T's)

Student Name	Exps Paid	Status During the year (ie. Fresh. Soph. etc)
_____	_____	_____
_____	_____	_____

Energy Credit Information

please enclose information

Description of Expenditure	Amount	Additional Notes
_____	_____	_____