



SELINA J WELLE CPA PLLC

January 16, 2024

Hello Valued Clients and Friends,

Happy New Year! It is time to start thinking about taxes and watching for your income tax information to arrive in the mail. The IRS will allow us to begin processing 2023 tax returns on January 29, 2024.

We are preparing for the upcoming tax filing season and will be uploading your income tax organizer to your secure portal as soon as the software is updated. Paper copies available upon request.

SecureFilePro Document Portal: You can send us your documents through this portal by scanning your documents and uploading them directly into the portal, e-mail, or fax. We do not have a drop off location, so electronically is the best and preferred option. If you are unable to send your income tax documents electronically or by fax, then you can mail them to me at the address below.

If you choose to mail your documents, please send copies, and **keep your original documents**. It can take up to 2 weeks to get to me.

Appointments: Appointments do run out so please schedule your appointment early. To schedule your appointment, you can do so directly on my website www.wellecpa.com or you can call our office at 480-945-0623. If you cancel your appointment within 24 hours and the appointment can't be filled, you will be charged a \$50 cancelation fee.

Virtual & Phone Appointments: We will be using Ring Central for secure virtual appointments. A meeting link for your computer access into the meeting will be sent prior to your appointment.

We need to have your tax information, the completed questionnaire and signed engagement letter received by our office at least a week in advance of your virtual or phone appointment so that we have time to work on your information and be ready for our meeting.

Live Appointments: We will be doing a limited number of live appointments in Mesa. This is located just off US 60 and Higley. In the **SanTan Boardroom near the restrooms**.

The live appointments will be held at:

**Residence Inn Gilbert
3021 E. Banner Gateway Dr.
Gilbert, AZ 85234**

PO Box 266, Lukeville, AZ 85341

Phone: (480) 945-0623

fax (480) 866-8440

www.wellecpa.com

Live appointments are only available the following weeks (all other dates are virtual or phone appointments):

February 18th through March 2nd

March 24th through March 30th

We need to have your paperwork received by our office on or before March 15th to allow us time to complete it by the April 15th deadline, otherwise it may be extended, although we will do everything in our power to get it filed on time.

Audit Protection Insurance: Our office offers Audit Protection Insurance. The audit insurance policy for the tax year is \$89.95 and covers the return's federal audit period of three years.

Website: wellecpa.com You can find important government websites, state dollar for dollar tax credit information, commonly used forms, and general information. We have also provided links to our SecureFilePro portal, Appointment Scheduling, Tax Return Fee Payment Processing and Payroll Processing platform.

Tax Credit Card Thumb Drives: If you would like to purchase a thumb drive with a copy of your current income tax return and backup source documents, we are providing them for a fee of \$25.00.

Tax Return Fees: The minimum tax return fee is \$300 (Includes Schedule A & B), additional fees for other forms and schedules will be additional fees.

We offer a discount for completing your dependent's income tax return for a rate of \$85. This discount applies to tax returns for children 18 years old or younger, and for college dependents on your return. Once they do not meet the previous criteria, the minimum will be \$300 as mentioned above.

All preparation fees are due at the time of service, and can be paid by cash (live appointments), check, credit card, or Venmo: @SelinaJo-Welle

We look forward to working with you and assisting you with your income tax needs!

Sincerely,

Selina Jo Dawn Welle, CPA

PO Box 266, Lukeville, AZ 85341

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