

# Rejoyce L. H. Lunceford, CPA, PLC

Your Peace of Mind Awaits

January 12, 2024

Dear Business Tax Clients,

We hope this correspondence finds you healthy and well. We are ready for the 2023 tax season and would like welcome you to our 2023 tax season process; we have summarized a few important topics and updates in this letter.

## WHAT YOU NEED TO KNOW ABOUT THIS TAX SEASON

We have added staff, Kevin Gallin. Kevin has over 15 years' experience in taxation and bookkeeping. He has worked with me on a part-time basis since 2018. He joined my staff full-time in June 2023. You may receive an email from Kevin during tax season. [Kevin@CPARejoyce.com](mailto:Kevin@CPARejoyce.com)

We have also added my son Douglas Lunceford to our staff as an office manager this tax season. [Douglas@CPARejoyce.com](mailto:Douglas@CPARejoyce.com)

The tax filing deadline this year for partnerships and S-corps, without extension, is Friday, March 15, 2024. Engagement letters are going out next week.

We strongly urge you to get us your information as soon as possible, especially if we need to reconcile your accounts. If your business is not engaged for monthly bookkeeping with us, and you would like to be, please email Douglas to schedule a meeting to determine your needs.

If we are only providing tax preparation services, please ensure you have reconciled all bank accounts, credit cards accounts, and loan accounts before providing to us a trial balance of your business. You will want to make sure your business expenses and revenues are completely entered for the year.

## FEES

Our fees for tax preparation are based on the complexity of the return and the time it takes to prepare/file it. There is not a direct increase to your last year preparation fees. We accept major credit cards, checks, and cash. Fees are collected 50% upfront when

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you sign your engagement letter and 50% upon completion of your return. We will not start work on your return until we have both a signed engagement letter and 50% of the tax preparation fee.

#### APPOINTMENTS

If you have any detailed questions or would like to meet with us to discuss any new or unusual circumstances, please email Douglas to set-up a virtual or face-to-face meeting. Note that there are a limited number of appointments during this time frame, so please schedule early.

If you have any questions, please let us know. A satisfied client is our most valuable asset. Your recommendation to an associate, friend or family member is more significant than any advertisement. We sincerely appreciate your patronage and as always, we strive to provide you with professional and efficient service.

We look forward to seeing you in 2024. If you have any questions regarding this letter or our services, please do not hesitate to call.

#### BENEFICIAL OWNERSHIP INFORMATION

The US Department of the Treasury, FINCEN, Financial Crimes Enforcement Network ([www.fincen.gov](http://www.fincen.gov)) has mandated additional filing requirements for businesses in the US. If you would like me to file the information on your behalf, a separate engagement will need to be signed.

If you have complex ownership structures, it is recommended to seek out the assistance of a licensed attorney to complete this requirement.

Please let me know via [Douglas@CPARejoyce.com](mailto:Douglas@CPARejoyce.com) if this is something your business would like me to do. Existing businesses have the calendar year to do complete the requirements. New businesses started January 1, 2024 have 90 days and businesses started January 1, 2025 have 30 days to file.

Sincerely,



Rejoyce Lunceford, CPA