January 12, 2024

Dear Individual Tax Clients,

We hope this correspondence finds you healthy and well. We are ready for the 2023 tax season and would like to remind you on our firm's 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

We have also added my son Douglas Lunceford to our staff as an office manager this tax season. Douglas@CPARejoyce.com

The tax filing deadline this year, without extension, is Tuesday, April 18, 2024. We strongly urge you to get us your information as soon as possible. Engagements for individual returns will be sent out the week of January 22, 2024 to existing clients.

Attached is our tax organizer which will help you organize your tax information. The tax organizer is a guide that you can reference to remind you of information required to complete your tax return. It is preferred to use the customized online portal option which will be emailed to you the week of January 22, 2024.

There are several ways to safely provide your tax documents to us. Information may be mailed to our office, personally dropped off, or e-mailed to our office manager, Douglas. If you choose to e-mail your information, please note your name in the subject line and take steps to ensure cyber security (i.e. password protecting documents, etc.).

IRS INFORMATION
Refunds may be smaller in 2023. Taxpayers will not receive an additional stimulus

payment with a 2023 tax refund because there were no Economic Impact Payments (Stimulus Checks) in 2022.

The IRS cautions taxpayers not to rely on receiving a 2023 federal tax refund by a certain date. Some returns may require additional review and may take longer. The IRS continues to strengthen security reviews to protect against identity theft. Additionally, refunds to people claiming the Earned Income Tax Credit (EITC) or the Additional Child Tax Credit (ACTC) can't be issued before mid-February. This law helps ensure taxpayers receive the refund they're due by giving the IRS time to detect and prevent fraud.

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 in rates from last year. We major credit cards, personal checks, cash, Venmo, and Cash App. Fees are collected 50% upfront when 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.

Sincerely,

RLford

Rejoyce Lunceford, CPA

Please provide the following Tax documents needed to prepare your return

- ☐ W2
- ☐ 1099-DIV
- ☐ 1099R
- ☐ Taxpayer's RRB-1099
- ☐ Taxpayer's SSA-1099
- ☐ 1099-Misc
- ☐ 1099-B
- ☐ K-1 Scorp
- ☐ 1098 Home Mortgage
- ☐ 1099-INT
- ☐ 1099-Comp
- ☐ W2G
- ☐ Spouse's RRB-1099
- ☐ Spouse's SSA-1099
- ☐ 1099-Q
- ☐ K-1 Partnerships
- ☐ K-1 Trusts
- ☐ 1099-G Unemployment Compensation

Please provide the following information needed to prepare your tax return

- ☐ What is your current address?____________________
- ☐ Did your marital status change before 12/31/2018?____________________
- ☐ Were there any changes in dependents?____________________
- ☐ Did you have any child or dependency care expenses? Please include care provider's name, address, SSN, and amount.____________________
- ☐ Did you buy or sell stocks, mutual funds, bonds, or other investment properties?____________________
- ☐ Did you buy, sell, or refinance your home?____________________
- ☐ Did you donate money, clothes, cars, or stock?____________________
- ☐ Did you incur any tuition or continuing education expenses?____________________
- ☐ Did you receive a distribution from or make a contribution to a retirement plan (401(k), IRA, etc.)?____________________
- ☐ Did you and your dependents have health care coverage for the full-year?____________________
- ☐ Did you receive any of the following IRS documents? Form 1095-A, 1095-B, or Form 1095-C? If so, please send.__
- ☐ For direct deposit, please provide your bank name, routing number, and account number?____________________
- ☐ Do you want to electronically file your tax return?____________________
- ☐ Please list any questions or other concerns you might have.____________________

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