Rejoyce L. H. Lunceford, CPA, PLC

Your Peace of Mind Awaits

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,

Rejoyce Lunceford, CPA

Rejoyce L. H. Lunceford, CPA, PLC

Your Peace of Mind Awaits

W2 1099-INT 1099-DIV 1099-Comp 1099-R W2G 1099-Misc 1099-G 1099-B Spouse's SSA-1099 1099-B K-1 Fartnerships K-1 Scop K-1 Trusts 1099-B thisc 1099-G 1099-B 1099-G 1099-B K-1 Fartnerships K-1 Scop K-1 Fartnerships 1098 Home Mortgage 1099-G Unemployment Compensation Please provide the following information needed to prepare your tax return What is your current address? 1099-G Did your marital status change before 12/31/2018? amount. Were there any changes in dependents? 1099-G Did you buy or sell stocks, mutual funds, bonds, or other investment properties? 101 you you or sell stocks, mutual funds, bonds, or other investment properties? Did you locur any tuition or ortaking education expenses? 101 you and your dependents have health care coverage for the full-year? Did you and your dependents have health care coverage for the full-year? 109 you any our dependents have health care coverage for the full-year? Did you and your dependents have health care coverage for the full-year? 109 you want to electronically file your tax return?	Please provide the following Tax documents r	needed to prepare your return
I 099R W2G Spouse's SRB-1099 Spouse's SSA-1099 I 099-Misc D09-Q I 099-B K-1 Partnerships I 098 Home Mortgage D09-G Unemployment Compensation Pease provide the following information needed to prepare your tax return What is your current address? D1099-G Unemployment Compensation Pease provide the following information needed to prepare your tax return Were there any changes in dependency care expenses? Please include care provider's name, address, SSN, and amount. 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 or sell stocks, mutual funds, bonds, or other investment properties? Did you buy or sell stocks, mutual funds, bonds, or other investment properties? Did you and your dependents have health care coverage for the full-year? Did you receive a distribution from or make a contribution to a retirement plan (401(k), IRA, etc.)? Did you want to electronically file your tax return? Did you receive any of the following IRS documents? Form 1095-C? If so, please send. For direct deposit, please provide your tax return? Did you receive any questions or other concerns you might have. Dis you want to electroni	□ w2	🗆 1099-INT
Taxpayer's RRB-1099 Spouse's RRB-1099 Spouse's SSA-1099 Spo	🗆 1099-DIV	🗆 1099-Comp
Taxpayer's SSA-1099 Spouse's SSA-1099 1099-Misc 1099-Q 1099-B K-1 Scorp 1098 Home Mortgage 1099-G Unemployment Compensation Please provide the following information needed to prepare your tax return What is your current address? 1099-G Unemployment Compensation Please provide the following information needed to prepare your tax return 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 hour or continuing education expenses? Did you hour any tuition or continuing education expenses? Did you and your dependents have health care coverage for the full-year? Did you and your dependents have health care coverage for the full-year? Did you and your dependents have health care coverage for the full-year? 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, 1055-B, or Form 1095-C? If so, please send. For direct deposit, please provide your bank name, routing number, and account number? Did you receive any of the following number, and account number? Do you want to electronically file your tax return? Did you gour coeive any of the following number, and account number? <t< th=""><th>🗆 1099R</th><th>□ w2G</th></t<>	🗆 1099R	□ w2G
Taxpayer's SSA-1099 Spouse's SSA-1099 1099-Misc 1099-Q 1099-B K-1 Scorp 1098 Home Mortgage 1099-G Unemployment Compensation Please provide the following information needed to prepare your tax return What is your current address? 1099-G Unemployment Compensation Please provide the following information needed to prepare your tax return 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 hour or continuing education expenses? Did you hour any tuition or continuing education expenses? Did you and your dependents have health care coverage for the full-year? Did you and your dependents have health care coverage for the full-year? Did you and your dependents have health care coverage for the full-year? 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, 1055-B, or Form 1095-C? If so, please send. For direct deposit, please provide your bank name, routing number, and account number? Did you receive any of the following number, and account number? Do you want to electronically file your tax return? Did you gour coeive any of the following number, and account number? <t< th=""><th>Taxpayer's RRB-1099</th><th>Spouse's RRB-1099</th></t<>	Taxpayer's RRB-1099	Spouse's RRB-1099
I 0099-Misc I 0099-Q I 1099-B K-1 Partnerships I 1098 Home Mortgage I 099-G Unemployment Compensation Please provide the following information needed to prepare your tax return I 009 via marital status change before 12/31/2018? Did you marital status change before 12/31/2018? I of you have any child or dependents? Did you have any child or dependency care expenses? Please include care provider's name, address, SSN, and anotation I of you buy or sell stocks, mutual funds, bonds, or other investment properties? Did you have any child or dependency care expenses? Please include care provider's name, address, SSN, and anotation Did you buy, sell, or refinance your home? Did you buy or sell stocks, mutual funds, bonds, or other investment properties? Did you and your dependents have health care coverage for the full-year? Did you and your dependents have health care coverage for the full-year? Did you want to electronically file your tax return? Did you want to electronically file your tax return? Die you want to electronically file your tax return? Please list any questions or other concerns you might have. INO2 Lewis Cir MWWVCPARejoyce.com Notecee CPARejoyce.com INO2 Lewis Cir <		Spouse's SSA-1099
I 099-B K-1 Scorp I 098 Home Mortgage I 099-G Unemployment Compensation Please provide the following information needed to prepare your tax return I 0100 you marital status change before 12/31/2018? I 0100 you process and dependents? I 0100 you process and pendents? I 0100 you yor sell stocks, mutual funds, bonds, or other investment properties? I 0100 you go reelise and stifubution from or make a contribution to a retirement plan (401(k), IRA, etc.)? I 0100 you and your dependents have health care coverage for the full-year? I 0100 you and your dependents have health care coverage for the full-year? I 0100 you want to electronically file your tax return? I 0100 you want to electronically file your tax return? I 0100 you want to electronically file your tax return? I 0100 you want to electronically file your tax return? I 0100 you want to electronically file your tax return? I 0100 you want to electronically file your tax return? I 0100 you want to electronically file your tax return? I 0100 you want to electronically file your tax return? I 01000 you want to electro		'
_ K-1 Scorp _ K-1 Trusts _ 1098 Home Mortgage _ 1099-G Unemployment Compensation Please provide the following information needed to prepare your tax return	🛛 1099-В	☐ K-1 Partnerships
Image: Image: Image: Imag	K-1 Scorp	·
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 out an or continuing education expenses? Did you incur any tuition or continuing education expenses? Did you andy our dependents have health care coverage for the full-year? Did you want to electronically file your tax return? Do you want to electronically file your tax return? Please list any questions or other concerns you might have. WWW.CPAREjouce.com MWW.CPAREjouce.com Di2 Lewis Cir Winchester, VA 22502	•	
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 onate 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 receive a distribution from or make a contribution to a retirement plan (401(k), IRA, etc.)? 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. Www.CPARejoyce.com Www.CPARejoyce.com Di2 Lewis Cir Vinchester. VA 22602	Please provide the following information needed to p	repare your tax return
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 onate 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 receive a distribution from or make a contribution to a retirement plan (401(k), IRA, etc.)? 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. Www.CPARejoyce.com Www.CPARejoyce.com Di2 Lewis Cir Vinchester, VA 22602	What is your current address?	
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 onate 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 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. Image: Www.CPARejoyce.com Mww.CPARejoyce.com		
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 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.		
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. Www.CPARejoyce.com Nwww.CPARejoyce.com No2 Lewis Cir Winchester, VA 22602	Did you have any child or dependency care expenses?	Please include care provider's name, address, SSN, and
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. Www.CPARejouyce.com Rejouce@CPARejouyce.com Di2 Lewis Cir Winchester, VA 22602	\Box Did you buy or sell stocks, mutual funds, bonds, or oth	er investment properties?
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. Www.CPARejouyce.com Rejouce@CPARejouyce.com Di2 Lewis Cir Winchester, VA 22602	Did you buy, sell, or refinance your home?	
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. Www.CPARejoyce.com Www.CPARejoyce.com Did You incur any tuition or continuing education expenses? ID2 Lewis Cir Winchester, VA 22602		
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. Www.CPARejoyce.com Www.CPARejoyce.com D02 Lewis Cir Winchester, VA 22602	_	
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. Www.CPARejoyce.com Www.CPARejoyce.com D2 Lewis Cir Winchester, VA 22602		
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 Www.CPARejoyce.com Rejoyce@CPARejoyce.com 102 Lewis Cir Winchester. VA 22602		
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. Www.CPARejoyce.com November 2012 November 20	☐ Did you and your dependents have health care covera	ge for the full-year?
Do you want to electronically file your tax return? Delease list any questions or other concerns you might have. Please list any questions or other concerns you might have.	\Box Did you receive any of the following IRS documents? F	Form 1095-A, 1095-B, or Form 1095-C? If so, please send
Please list any questions or other concerns you might have.	\Box For direct deposit, please provide your bank name, rou	iting number, and account number?
Please list any questions or other concerns you might have.	\Box Do you want to electronically file your tax return?	
www.CPARejoyce.com Rejoyce@CPARejoyce.com	_	
Rejoyce@CPARejoyce.com 🛛 Winchester. VA 22602		
Rejoyce@CPARejoyce.com 🛛 Winchester, VA 22602		
Rejoyce@CPARejoyce.com 🛛 Winchester, VA 22602		
Rejoyce@CPARejoyce.com 🛛 Winchester, VA 22602		
Rejoyce@CPARejoyce.com 🛛 Winchester, VA 22602		
Rejoyce@CPARejoyce.com 👝 Winchester. VA 22602		
Rejoyce@CPARejoyce.com 🛛 Winchester, VA 22602	(
Rejoyce@CPARejoyce.com 🛛 Winchester, VA 22602	CDA Deleuros som	102 L 4- Cir
571-357-2591	Rejoyce@CPARejoyce.com	
		571-357-2591
1		