

Here we are at the middle of January already! The IRS & the State of MN announced this week that the **opening date for e-Filing taxes opens on January 29, 2024.**

Here are some tips & tricks when using our SafeSend Organizers; if you didn't receive it, please check your spam filter:

1. noreply@safesendreturns.com - **Add this email to your safe list to prevent it from being categorized as spam or junk and to be able to access delivery returns for 7 years.**
 - a. **If you didn't add this email to your safe sender list, we have heard your Mail carrier may block images &/or un-color visual ques for you to read & click containing the direct links to log into the platform.**
2. In order to view your custom organizer, you must answer the required questionnaire first; once you have answered these, it will let you save, move forward with downloading the organizer OR custom editing live on the electronic organizer.
3. If you are single, on the custom questionnaire, you must put "**NONE**" in the **spouse signature and date line**, or it will flag it as an unanswered required question.
4. If you plan on having a IN-PERSON tax meeting at my office, DON'T upload any documents to the portal. Please bring all the original documents to your IN-PERSON meeting, in order to not create confusion.
5. If you plan on DROPPING off your tax at my office, DON'T upload any documents to the portal. Please bring all the original documents into the office, in order to not create confusion.
6. While using SafeSend, please scan your documents in **1 continuous PDF** file vs each separate document; if you don't have a scanner the **CamScanner** app is a great tool! It is very difficult on our end when we receive different formatted files, multiple uploads, etc.
7. **Please round all your numbers on your worksheets** to the appropriate dollar (.49 and under go to the lower dollar & .50 and above round up).
8. I have attached fillable questionnaires; all blank documents and additional questionnaires are available for download, on our website, under the Tax Organizer section.

Reminders:

1099 Reporting

The season for 1099s and W-2s is through the month of January. This is an area that we strongly stress you complete accurately. If you are in need of help with filing any 1099s or W-2s, please contact us as soon as possible, so we can process them for you timely and accurately. Anything received after January 22nd will not be guaranteed to be completed by January 31st due to volume and time constraints.

Congratulations to those of you who have had new little tax credits. Please be sure to bring their Social Security number and Date of Birth, and Full Name Spelling with you. If your child went to a daycare, please bring the yearend statement from the provider.

Also, congratulations to those of you who have gotten married this year. If you have recently gotten married, do not forget to notify the Social Security Office of any last name changes. If you are planning your appointment without your new spouse, please bring a copy of the certified marriage certificate, copy of their social security card, and copy of their driver's license.

Please visit our website (2024 Updates Tab) to view more information regarding the following topics: **Beneficial ownership information (BOI) reporting for businesses begins in 2024, Earned Sick and Safe time requirements, Tax credit for new clean vehicles, Tax credit for energy efficient home improvements.**

Last reminder, the Federal Trade Commission passed a law (The Safeguard Rule) that by June 9, 2023 all non-bank financial institutes must comply with. **It dictates that I am no longer allowed to accept sensitive information electronically without a two-part authentication; this includes emails.** Any documents you want to send us must be sent through our exchange link. Any attachments not sent this way are automatically blocked by our email security system.