

January 1, 2024

Happy New Year!

We at Beatty Tax and Accounting hope 2023 was an excellent and prosperous year for everyone.

Beginning January 18<sup>th</sup>, 2024, our office hours are **9 A.M. to 5 P.M. Mon – Th and Fri, 9 A.M. to 1 P.M.** If your schedule doesn't allow for a requested appointment during the above stated hours, please contact our office for possible options. Tax appointments will be made in fifteen minute to one hour intervals depending on the needs of our clients.

**'Drop offs' are a popular option for our clients. We encourage 'drop offs' of all tax documents. We accept drop offs electronically or in person. Clients are notified upon completion; at which time a short appointment can be made for a review if required. 'Drop off' returns normally have a 5-10 business day turn around for completion.**

For the convenience of our email clients, we have also included our basic tax tool, the worksheet, at the end of our letter. Please feel free to print the worksheet if you choose. Please call our office if you have questions about tax documents. When in doubt, bring it all! All clients may provide documents via secure email; send to [Chris@beattyandcotax.com](mailto:Chris@beattyandcotax.com), fax or send via certified mail to the numbers listed at the bottom of this letter. We can also create a secure file to upload your documents. If you have any further questions, call the numbers listed below.

Some important **deadline reminders** (unless IRS extends deadlines):

- Partnership and S-Corp returns must be in our office no later than February 28<sup>th</sup>, 2024, for March 15<sup>th</sup>, 2024 deadline \*\*
- C-Corp returns must be in our office no later than March 15<sup>th</sup>, 2024, for April 15<sup>th</sup>, 2024 deadline \*\*

**\*\*If Partnership, S-Corp and C-Corp documents are not received by the above dates, an extension will be filed**

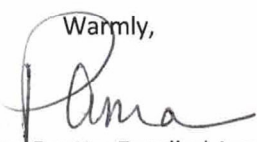
- All individual returns must be in our office no later than April 10, 2024, for April 15<sup>th</sup>, 2024 deadline
- F-BAR return is due April 15<sup>th</sup>, 2023; if an extension is needed for F-BAR the IRS now allows extensions up to 6 months
- Extensions on Partnerships and S-Corp must be filed by March 15<sup>th</sup>, 2024
- Extensions on C-Corp and individuals must be filed by April 15<sup>th</sup>, 2024 \*\*
- All documents for S Corp and partnership extensions will need to be provided by September 1<sup>st</sup>.
- All documents for C Corp and personal extensions Will need to be provided by October 1<sup>st</sup>.

**\*\* Please understand that extensions are for filing only, not extensions of time to pay.**

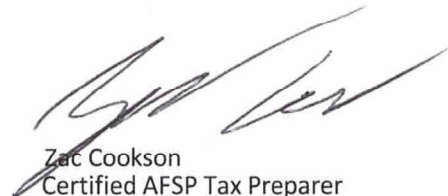
**As with all other accounting offices, a fee is charged for phone calls and emails. These take considerable amounts of time and research, depending on client needs. Our office is no different and bills in increments of 15 min for calls/emails to answer accounting and tax questions throughout the year. Our service fees are posted clearly at the front desk.**

**We are looking forward to working with each of you and catching up on your previous year! We thank you for your continued referrals as this speaks volumes about our office. Please ask family and friends to use your name when calling the office so we know they are a referral. Thank you! We wish you a healthy and prosperous 2023.**

Warmly,



Pama Beatty, Enrolled Agent  
CEO Beatty & Co Tax and Accounting



Zac Cookson  
Certified AFSP Tax Preparer



Christina Oursler  
Office Manager