

Dear Client,

January 3, 2024

Happy New Year! This year our newsletter is designed to give you the guidance for the information we need to prepare your 2023 individual tax return. Thank you for your business this past year! I hope to earn your business again this year!

**New items to highlight:**

- There are new credits for home improvements. If you installed a new furnace, A/C, boiler, heat pump, water heater, woodstove, windows, doors, insulation, or solar energy you must provide a copy of the invoice to get the new credits.
- Similarly, if you bought a new electric or hybrid car in 2023, please be sure to provide that invoice copy.
- Cryptocurrency activities continue to cause tax problems for people that believe it is not reportable. Cryptocurrency is taxable and reportable. Please bring your documents if you have cryptocurrency.

**I will be offering few different opportunities to get your taxes prepared:**

- Drop them at my home, there is a locked drop box at the corner of the house by the driveway. Or drop them off during business hours (listed on my website)
- An appointment at my home office, which has a separate business entrance. You can electronically set up your appointment at <http://hopestaxserviceilc.schedulista.com>. Or if you prefer you can email, text or call me to set up your appointment.
- Mail them to me
- I can send you a link to a secure portal (website or app) to upload your documents too. Then I can send your tax return to you thru the portal (website) and you can electronically sign it.

**I will be offering appointments:**

Mon, Wed and Thur 9am-8pm

Tues 4pm-8pm

Fri and Sat 9am-4pm

Sunday 12pm-4pm in February. Closed Sundays in March and April.

There will be some dates in March and April that hours will vary slightly.

There is an organizer for your assistance in gathering your tax documents. There is also a summary list of forms needed to prepare your taxes, which you can use as a checklist in making sure you have your forms.

Before I can submit your tax return to the IRS this year, I **MUST** have payment for my tax preparation services, the electronic filing forms signed by all taxpayers and all taxpayers **photo ID's** (you can provide copies with your documents).

**I appreciate your business and enjoy preparing your return each year!**

Thank you!

Hope Diercks

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