

A Accounting & Tax Service

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Winter Hours: Monday – Friday 8:00am to 4:30pm (starting January 30, 2023)

Happy New Year 2023!

Tax season is once again upon us and the staff at *A Accounting & Tax Service* are busy preparing.

We have enclosed a Tax Checklist for you to complete and return with your tax information.

We are encouraging our tax clients to simply drop off their tax returns this year. If you need to speak with the tax preparer prior to her starting your tax return, just let us know when you drop off your information. Appointments can be made, if necessary, by calling our office. Also, if you would like to drop off your information after business hours, please feel free to utilize our locked drop box located next to our front door. This secured box is checked every morning. Like many other businesses, we are short-staffed and greatly appreciate your patience.

You are not required to have health insurance, however, if you had Marketplace insurance in 2022, please bring the corresponding 1095-A. You can download copies of Form 1095-A through your Marketplace account, where they may be available before you get your copy in the mail.

If you qualify for any of the following credits, you may be asked to provide additional documentation as required by the 2022 Paid Preparer Due Diligence Checklist:

- * *Earned Income Credit (EIC)*
- * *American Opportunity Credit (AOC)*
- * *Credit for Other Dependents (ODC)*
- * *Head of Household (HOH)*
- * *Child Tax Credit (CTC)*

A Few Reminders: We require the following items: W-2's, 1099's, social security numbers, birthdates for new dependents, tuition information for college students, along with other income and deduction information you may have. If you paid rent, please include that information on the Tax Checklist to include the amount you paid in 2022 and whether that amount included heat. Also, if you are separated or divorced, we need proof it is your year to claim dependent(s).

We DO need a copy of last year's tax return.

We accept cash, check, debit, and credit cards, however, due to the increase in credit card fees, cash, check or debit card payments would be appreciated.

In the event of inclement weather (or impending inclement weather), please contact our office at (920) 434-6055 to determine if we are open before you travel.

The staff at *A Accounting & Tax Service* look forward to assisting you with your 2022 income tax return and thank you for your business.

Sincerely,



Sandra Pfefferman, Owner
Lisa, Sherry, and Terri