



# 2023 Highlights for the Year

## For Clients virtually submitting documents:

**IMPORTANT** For data protection and security purposes, documents will not be accepted as attachments via email. All documents must be uploaded into the client portal, dropped off in person or faxed.

## REMINDERS from last year:

### Annual Letter of Engagement:

- Please remember to sign by all parties & provide with your materials OR uploaded if not in person (e-sign stamp will not be accepted). Submit with your materials for your file to be considered in good order and ready for preparation.

### Client Intake Form:

- Filling out our quick 5-minute form will allow us to streamline the processing of your return and minimize the need to interrupt your day with questions.
- Please note we cannot begin to process your return without receiving a signed Letter of Engagement AND the completed Client Intake Form. Your return will be put in a holding pattern until both are received.

### Virtual /Remote Signers Security Requirements:

- For taxpayers signing their return remotely, we must jump on a brief video meeting either over Facetime or Zoom to discuss the tax year and receive virtual pins.
- If you are completing the entire process virtually without any video meeting, we will need additional documents, please call the office for a list of what we can accept.

### Virtual Currency:

- A separate currency engagement letter must be signed for anyone with virtual currency per IRS guidelines. Please see form "Virtual Currency Questionnaire" on the Resources page of our website. A consolidated statement of transactions for virtual currency investments will likely be needed if transactions were done.

## For Clients with Dependents:

- **Proof of Dependent Address:** Remember to submit 'Proof of Address for Child' to meet IRS due diligence requirements (*see checklist for examples of acceptable forms*)
- **Dependent Care Credits:** To receive a tax write off for childcare expenses: Must have a statement from the daycare/camp with the child's name and address on it, as well as the payer's name on it. See checklist for more details/ call the office.
- **Head of Household/Other Dependent Credit:** a review of qualification must be done annually per IRS guidelines. Please find the Head of Household Worksheet under the Resources tab on our website or call the office to request an HOH sheet to complete with your materials.

## For Clients with Higher Education Expenses:

- 1098T & as discussed last year, we MAY need an Account Transaction history from the college or University. We can provide a form letter template to request this information from your school if necessary.
- If you paid the tuition & are claiming the credit, a copy of the cleared check/ bank record should be included in your personal tax file for the year from your account.
- Look at the Student Guide on the Website for more information.