



Name: _____
 Best Phone #: _____ (Home OR Cell)
 Email Address: _____

Did you move at any time during the year? If yes, please provide dates: If yes, new mailing address:	Yes	No
---	-----	----

Did you marry, divorce, &or have a child/dependent change during 2023? If yes, Spouse's name, birthday, ss#? If yes, Child's name, birthday, ss#?	Yes	No
--	-----	----

Did any of your children graduate high school during year? Note: If in college or trade school, we need copy of Form 1098-T	Yes	No
---	-----	----

Did any of your children graduate college during year? What was date of graduation? Note: If in college or trade school, we need copy of Form 1098-T	Yes	No
---	-----	----

Would you like to e-file or mail your return?	EFILE	MAIL
--	-------	------

If refund, do you desire it to be direct deposited? Note: We will need copy of voided check (not deposit slip) if not on file at time information is dropped off	YesDD	NoDD
--	-------	------

Would you like to receive a secure, free electronic return copy immediately upon completion OR a paper copy? (paper copy will be provided if both are circled) Note: Generally, this reduces processing time by average of 5 business days. We need your email address on electronic copy requests	E-Copy	PAPER
---	--------	-------

2023 Federal Estimated Payments (not withholding on W2 or 1099)?	Yes	No
2023 State Estimated Payments (not withholding on W2 or 1099)?	Yes	No
2023 Local Estimated Payments (not withholding on W2 or 1099)?	Yes	No
Note: We will need dates and amounts paid for each one noted above		

Did you have healthcare via Exchange (Obamacare)? Note: We will need copy of Form 1095 (especially Form 1095-A)	Yes	No
---	-----	----

Did you invest in any crypto currency during year (Bitcoin etc)? Note: We will need information on any sales or exchanges made	Yes	No
--	-----	----

Did you make charitable contribs during year? If yes, please provide us the total made?	Yes	No
---	-----	----

Are these all of your tax documents? Note: Please indicate if more information will be forthcoming	Yes	No
--	-----	----

Helpful Comments/Notes on above?:

The above information is true and correct
 Signature/Date:



It's that time of year again... Tax Season 2024 is here!

We would personally like to thank you for returning for 2023 income taxes. We truly enjoy working with you, our business family. Thank you for the kind referrals and voting us the Best Accounting Firm in the Region! I have been asked "if we still accept new clients"? ("Yes" BUT – we are really evaluating going forward what clients we will be accepting). Things get hectic in the offices and your patience means the world to us during the "tax season" months.

Please note in the attached newsletter that we have adjusted our office policies. Please take the time to see if these are applicable to your situation. If you provide loose, not totaled receipts, we will access a "bookkeeping" fee to process these. We will provide you with either an electronic **OR** paper copy of your return. We generally need 10 business days to process your materials and to avoid any expediting fee.

As I also have stressed over recent years, Federal, State and Local governments are increasingly pressed for funds due to the economy and tight budgets. We stress and emphasize diligence at getting us timely information, making sure to let us know about estimated payments, providing us ALL forms received, and providing us accurate information. The tax return we provide to you is only as good as the information we receive. It is critical to let us know if you are making any estimated payments, providing all investment/income documents and life changes. Your notes are invaluable!!!

As we have emphasized and warned, Pennsylvania continues to attack and fight all deductions. Due to the ongoing budget issues, we fully expect this to continue. PA rejected at least 80-90% of the returns in 2020 that claimed PA UE expenses. If you desire to appeal and challenge later, this is a time-consuming process and not part of our tax prep fees.

Due to costs and time, we have raised the copy fee for additional returns. **PLEASE KEEP THE COPY OF THE RETURN** we provide to you. You can make as many copies to forward to whoever you desire. As a reminder, we generally do not process returns until at least Jan 31. In addition, we will not be processing any tax returns April 1 to April 15. We are happy to file an extension if needed and process later in the summer (**we will not be again working on 2023 returns until likely late August and then late September**).

When dropping off your taxes, important items to note for us (please complete checklist)...

- *Direct deposit bank info—cancelled checks required (need to know upon drop off)*
- *Correct Birthdates for you and all family members*
- *Did you make estimated payments for this year?*
- *If securities, stocks / funds were sold, we need the **cost basis** info from your advisor*
- *Any life changes -weddings, new children, divorce?*
- *New phone number or email address*
- *Will you be dropping off more information?*

Note: We have new, secure mail slot in front/main office door (if you deposit documents, we have it!).

Note: We offer quick turnaround of returns if you desire secure DocuSign

IRS Refund Status: <https://www.irs.gov/refunds>

PA Refund Status: <https://www.doreservices.state.pa.us/Individual/RefundDefault.htm>

We look forward to seeing you during this tax season!