

Dear Client,

January 2024

Let me again take this opportunity to thank you for your continued trust and confidence. It has been my pleasure serving you over the years, and I hope our relationship continues.

Our office location is the same as last year. We are located in the Mike McKeown Farmers Insurance Agency, in the small strip mall, on the southeast corner of 144th Place and LaGrange Road, at 9567 144th Place Orland Park. Jeanne Miller will be sharing our office with us.

We now have a website: gehrketaxprep.com It contains many links and tax tips. For example, there is a link to pay your tax prep fee by E*Check or credit card. There are links to pay your tax liability to the Fed and State governments online, rather than sending a check through the mail.

We have two main options on how we could prepare your tax return this year:

1) Come to our office for your tax prep

Before Feb 1, call 708-349-4023 (my home phone) After Jan 31, call 708-403-0966 (our office phone), or text 708-337-2099, or e-mail douggehrketaxprep@gmail.com to set up your office appointment

2) If you prefer not to come to the office for your appointment, you could:

Call us first, 708-403-0966, to let us know when and how you will be doing this:

Mail tax documents to Doug Gehrke, 9567 144th Place, Orland Park, IL 60462

You could drop off your tax documents at our office

Scan your documents to douggehrketaxprep@gmail.com,

FAX your documents to us at 708-349-5070

There are **four situations** where you will need to bring in additional information:

- 1) If you sold stocks, mutual funds, or cryptocurrency last year, we will need your **Final Brokerage Statement (1099-B) to complete your tax return**. This **Final Statement** typically arrives in **late February to mid March**.
- 2) If you, or your spouse, or any of your dependents, took any college classes, **please bring in Form 1098-T**, which is issued by their College. Your student may need to go online, to their College website portal, to download the 1098-T form for you.
- 3) If you purchased your Health Insurance through the Health Insurance Marketplace, you need to bring in **Form 1095-A**. The information from this form must still be submitted to the IRS with your tax return.
- 4) The energy credit has been expanded for 2023. Bring in records of any energy improvements you did to your personal residence


****Our Office Hours remain from 9am-8pm on Monday-Saturday, and Sunday mornings.

Our office hours sometimes vary from week to week****

The increased complexity of the tax laws, affecting your individual tax situation, may result in an increased tax preparation fee this year. Thank you in advance for your understanding.

My son, Rob, is an Optometrist. Many of you have gone to him, and have become his patients. His office contact number, to make an appointment, is 815-836-3564, which is his Lockport office. He also has an office in Bedford Park. Thank you in advance for your consideration.


Douglas C. Gehrke, AFSP, RTRP, MBA
Registered Tax Return Preparer


Jean C Gehrke-Patterson, AFSP
Annual Filing Season Participant