

YOUR 2023 GUIDE TO SIMPLE TAX RETURN PREP



DOCUMENT MANAGEMENT

- Primary - Karbon (click here for [tutorial](#))
- Secondary - Sharefile (log in here: <https://bleuxfinancial.sharefile.com>)
(This link can also be found in the signature of our emails)
- Stay safe - Please don't email your documents, use one of our platforms.
- To better process your information, we are not accepting jpegs and Apple Numbers (please use pdfs and Excel files instead)
- If you have a physical document that you need to share with us, you can try using a Scanning App instead of taking a photo. We recommend using Genius Scan.
- We mainly communicate via email, so in order to avoid missing communications from us, please add bleux.net to your safe list and/or create a dedicated email for us.

IRS LOGINS

- IRS Platform for individuals, use it to view records, pull transcripts, create payment plans, pay, view balance and more...
 - Create account here: <https://www.irs.gov/payments/your-online-account>
- IRS Website for direct payments for individuals without a login
 - Access here: <https://www.irs.gov/payments/direct-pay>
- IRS Platform for businesses (except for 1120 filers)
 - Access here: <https://www.irs.gov/businesses/business-tax-account>

TAX DEADLINES IRS CALENDAR

- March 15th: Tax Filing due date for 1065 and 1120-S
- April 15th: Tax Filing due date for 1040 and 1120
- September 16th: If Extension filed, Tax filing due date for 1065 and 1120-S
- October 15th: If Extension filed, Tax filing due date for 1040 and 1120
- Our deadlines are not changing. If you were directly affected by the recent natural events, please reach out to us to come to an agreement.

BLEUX'S DEADLINES

- **February 15th:** Deadline to provide us with all necessary information to process your 1065 and 1120S returns.
- **March 15th:** Deadline to provide us with all necessary information to process your 1040 and 1120 returns.
- If we have not received the necessary information to process your tax return 30 days before the filing deadline an extension will be filed.
- If we have not received the necessary information to process your tax return 30 days before the extension filing deadline an expedited fee will be charged. There will be no guarantee of a timely filing if information is received after the 30-day deadline.
- The extension deadlines (September 15th and October 15th) are final. There are no extensions beyond those dates.

IMPORTANT INFORMATION

- Filing for an Extension does NOT mean an extension to pay your tax liability due to the IRS/State Agency or tax return preparation fee owed to Bleux
- Full preparation payment is required by the filing deadline (March 15th or April 15th)
- No Tax Return will be filed without having full payment
- All bookkeeping must be completed by the time we start the preparing the return. Any time spent cleaning-up the books will be billed as an additional.

MORE INFO HERE

- Please be aware of phishing emails, as these are usually more prevalent during tax season. Before opening any links in an email, double-check that the email address of the sender is valid. We will never send you an email from an address that is not an @bleux.net email.
- We will be using Microsoft Teams for all meetings. Please test out Microsoft Teams before any scheduled meeting to help avoid delays. We ask that your video be on for these meetings to help us ensure the security of sensitive information on these calls.

"Ride The Wave Of Success"