



Dear Friends and Clients,

Happy New Year! We hope you had a safe and relaxing holiday with your loved ones. Tax season is soon approaching, and we would like to remind you of our firm policies. Please take note as a few of the policies are new this year.

We truly value and appreciate each one of you and thank you for the opportunity to serve you once again this year.

TAX SEASON POLICIES:

- Our office hours are 9AM – 5PM, Monday – Friday. The main office telephone number is (239) 325-5200
- Tax documents can be dropped off during regular business hours, mailed or uploaded to our new secure platform called TaxCaddy (more information on that below). We have disengaged from using NetClient CS portals.
- Once you have gathered your 1099's, W-2's, and other forms, please drop them off, mail or upload to your TaxCaddy. You can provide late K-1's once received. As a reminder, we need ALL pages of each 1099.
- Please include a list of any missing items. You may also include any questions which will be addressed prior to finalizing the return. *Exciting note:* One of the many features of TaxCaddy is it automatically shows you the missing information.
- If your tax documents are provided by March 1, 2024, we will complete the return prior to the filing deadline of April 15th, 2024.
- Due to our cyber security policy, we ask that you do not email documents that are not secured.
- Meetings are by appointment only. If you are a long-term client unless there is a major change, we encourage you to submit your documents and your CPA will reach out to you with any questions.
- Due to the compressed nature of tax season, we receive a high volume of calls and emails in a short period of time. If we are not immediately available, please leave a short, detailed message. Front desk calls will be returned within 24 hours. All other calls will be returned within 72 hours.
- During season we have a 3-to-4 week turnaround time. If you would like an update on the status of your return, please call Cherita at (239) 288-0329.
- Traditional Organizers, if requested or received in the past, will be mailed mid-January. Our new platform, TaxCaddy, will provide you with a questionnaire and document request list, which will take the place of our traditional organizers. Please only use one method of providing us this information.

TAXCADDY - G&C IS DEDICATED TO SECURING YOUR INFORMATION

As of 1/1/2024 we have adopted a highly secure, digital client collaboration platform called TaxCaddy. TaxCaddy is available on any device: PC, Mac, tablet, and the TaxCaddy app for iPad, iPhone, and Android.

Here's what you can expect:

- TaxCaddy is provided at no cost to you.
- Your TaxCaddy account will reflect your tax return progress with us. You will only need to provide the documents and tax information that are pending.
- You will have access to direct contact with your tax professional through TaxCaddy's messaging features.
- You can submit documents by taking pictures with the TaxCaddy mobile app, uploading files, or manually entering information.
- For greater convenience, you will also have the option of authorizing TaxCaddy to retrieve documents automatically from your financial institutions which will give us access to them immediately.
- Technical support and troubleshooting are available by email and chat in the TaxCaddy Help Center.

Soon you'll receive an email inviting you to create your TaxCaddy account. The email will contain instructions with three easy steps to get started. If you'd like to learn more while you wait for your invitation emails you can visit the TaxCaddy website at <https://taxcaddy.com>. **(Note: Do not use the "Sign Up Free" option on the TaxCaddy website. You'll use a personalized link in our upcoming invitation.)**

2024 OFFICE CLOSURES:

Tuesday, April 16
Monday, May 27
Thursday, July 4
Friday, July 5
Monday, September 2
Thursday, November 28
Friday, November 29
Tuesday, December 24
Wednesday, December 25
Thursday, December 26
Friday, December 27
Monday, December 30
Tuesday, December 31
Wednesday, January 1