



TAX YEAR 2023 CLIENT UPDATE

Dear Client,

Our firm looks forward to helping you with your 2023 income taxes! Tax returns must be filed by **April 15, 2024**. I hope everyone has had a healthy year. In the last year, there have been many changes, not only in the tax law, but also in the regulation of tax preparation. Enclosed is a list of items to keep in mind while gathering your tax documents. We know that changes can be very confusing, so we aim to help create a smoother tax season for all.

Due to IRS regulations, our firm must e-file your income tax returns. You can mail a check for tax payments or receive a check for tax refunds, but your income tax returns **must** be electronically filed. You have four options to deliver your tax documents to our office:

1. **Mail** all original documents to our office;
2. **Call** our office to schedule a personal meeting; *Appointments are limited to those who have had life-changing events throughout the year. There will be an additional fee for sit-down appointments.*
3. **Drop off** your documents at our office without a personal meeting;
4. **Scan** all documents and upload them to our secure portal. If you already have a password, go to Salasaccounting.com and click sign in. If you need to set up an account, e-mail us at info@salasaccounting.com and we will send you an invitation to the portal.

Our office will return a copy of your tax returns and all original documents.

For your convenience, a copy of the **tax organizer** is available on our website.
SALASACCOUNTING.COM.

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Please be sure to *LIKE* our page facebook.com/salasaccounting

Thank you for your business!

Jeanette Salas

See Back for Appointment Schedule

Please note that tax returns will not be filed until both the preparation fee and the signed consent forms have been received.

In addition, tax documents received after March 31st may need to go on extension, so please send your documents as soon as possible.

Appointment Schedule

If it is necessary, you may call to make an appointment during the day between the hours of 10:00 A.M. and 4:00 P.M. **using extension 10**. Appointments can be scheduled beginning **Tuesday, February 6th**. **FINAL APPOINTMENTS** on **Friday, March 29th**.

TUESDAYS	1:00PM - 6:00PM
THURSDAYS	1:00PM - 6:00PM
FRIDAYS	10:00AM - 6:00PM

NO AVAILABLE PARKING ON PALMER AVENUE
PLEASE PARK IN THE UPPER LEVEL OF THE PROSPECT STREET LOT

Mask May be required.

Things to Keep in Mind

Please read each bulletin and remember that not all bulletins apply to all clients.

Tax Documents

- Please do not send in your tax documents **until** you have received all the documents needed. Your tax return will not be worked on until all documents have been received.

Banking Information

- Make sure to update the office if your bank information has changed; a copy of a voided check is required. Our staff cannot take bank account information over the phone.

Driver's License or State ID

- If you have renewed or changed the information on your Driver's License or State ID, send in a copy of the front and back of the updated ID for all taxpayers.

Documentation

- For those taxpayers who typically qualify for the child tax credit and/or Head of household, the IRS require that you provide us (the tax preparer) a copy of your dependent's birth certificate and Social Security card.
- For those taxpayers who typically qualify for any education credits, they must provide form 1098-T. Most colleges do not mail out these forms, your student dependent must log in to their student account and print out tax document 1098-T.

Virtual Currency

- Our office needs to know, if at any time during 2022, did you receive (as a reward, award, or payment for property or services); or sell, send, exchange, gift, or otherwise dispose of a digital asset (or a financial asset in a digital asset). There are hundreds of virtual currencies. Just to mention a few of the most popular ones, Bitcoin, Litecoin, Ethereum, etc.

- ### New Child

Provide us with a copy of the child's birth certificate and social security card.

Non-compliance with the above bulletins may delay the filing of your tax return.