



January 2024

We have some new and expanded ways for you to get us your tax information!

Safe Send Organizers - The organizer program has fillable pdf forms and easy ways to upload your tax documents. We have received great feedback from our clients who loved using it last year. If you upload documents to us, you do not need to fill out that specific portion of the organizer, we will grab the information from the documents. The program will guide you through the organizer process and you can leave us notes if you have concerns or questions.

Safe Send Exchange - Each CPA has a secure link within their email signature that you can use to securely send us stray documents that come in after you have completed the organizer and uploaded documents.

Smart Vault Portal – We still have the Smart Vault portal as some clients like using that program to securely upload their documents to us. You will receive an email inviting you to use the portal during the last week of January.

When you have a majority of your 2023 information together; scan/upload, email, mail or drop it off. We have a mail slot, so you can drop off information 24 hours a day. Although we will try our best, extensions may be prepared for people who do not have their information in **before March 15th.**

- Fill out and return your organizer electronically or deliver by paper. **At a minimum:**
 - Review your personal information.
 - Fill out the questionnaire.
 - Sign and date the last page of the organizer questionnaire as acceptance of our engagement terms
- Upload or bring in the following documents:
 - All W-2's, 1099-R's reporting pension/IRA income, SSA-1099's reporting social security income
 - All 1099's reporting dividends, interest, miscellaneous income, stock, and real estate sales
 - All 1098's for mortgage interest and real estate taxes you paid.
 - Any K-1's for income from partnerships, S corporations, estates, or trusts
 - Any real estate HUD closing statement for sales, purchases or refinancing.
 - **A copy of your 2022 tax return, if not prepared by this office**

Thank you for partnering with us for your financial and tax needs. For those of you that are new to our firm, welcome. Here's to another year of hard work and some fun along the way.

Best Regards,
Nancy, Kathy, Becky, Chris & Charity