TAX ORGANIZER Taxable Year : 2023

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Certified Public Accountants

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Marital Status at end of Tax Year

- ☐ Married - filing jointly
- ☐ Married - filing seperately
- ☐ Head-of-Household with Qualifying Dependent
- ☐ Single
- ☐ Widow(er) - Date of Spouses Death___________

(T) - Taxpayer (S) - Spouse

Your Name		**D.O.B.**		**SSN**	
Spouse's Name		**D.O.B.**		**SSN**	
Address					
Address					
City		State		ZIP	
Primary Phone #		**Primary Email Address**			
Occupation(T)		**Occupation(S)**			

DEPENDENTS

First and Last Name	SSN	Relationship	Date of Birth

Did you move during the year 2023 ? : If so include closing statements for bought/sold home

Moved from - Old Address: ______________________ Date moved

Moved to - New Address: ______________________ Date moved

2023 Estimates	Federal Amount Paid	State Amount Paid	Local Amount Paid
2022 Overpayment			
April 15, 2023			
June 15, 2023			
Sept. 15, 2023			
Jan. 15, 2024			

Do you have any financial interest in, or authority over foreign account or trust?

☐ **Yes** ☐ **No**

At any time in 2023, did the taxpayer(s) receive (as a reward, award or payment) or sell, exchange, gift or dispose of a digital asset (or any financial interest in a digital asset)?

☐ **Yes** ☐ **No**

** If yes, include documentation / records.

If you are eligible for a **federal tax refund**, do you want the IRS to **directly deposit** your refund into your bank account?

** **PLEASE PROVIDE A COPY OF A CANCELED CHECK TO VERIFY THIS INFORMATION**

BANK NAME : ______________________________ **Account Type :** ☐ **Checking**
Account Number : ______________________________ ☐ **Savings**

Dear Valued Clients,

We would like to thank you for your continued support of our small family accounting firm. Barry Hostetter took over as majority owner in September 2021 with Ben Hostetter and Zachary Reis joining as minority owners during year 2023.

Important Tax Season Updates

Appointments- Limited 30 minutes, additional fee of **$50**, information only. Returns will not be completed or entered during appointments. Appointments are usually not necessary, and often take additional valuable time away from tax preparation. We hope to be able to get returns out in the order received as timely as possible. Reminder that appointments are available and encouraged year-round.

Pricing- Minimum pricing will be increased to **$175 ($125 Federal, $50 PA)** for individual tax returns, **$75** for dependents and **$75** for property tax rebate forms. Please see price sheet form on reverse side. Appointments, accounting, phone calls, emails, and letters will be $100/hour.

***** REMINDER - Payment for all returns is required at time of pick up and prior to Efile submission. *****

Organizer- The simple 1 page organizer (see included is required to be filled out in order to begin working on your return (drop-off & appointments). Please bring this along with your tax return information. **DO NOT** drop off early.

The organizer assists in bringing clarity to your tax situation.

Letter Protection Program- Optional $40 program fee we will cover any letters you receive for returns prepared by us for the 2023 tax year (postage included). If declined $50/ half hour of service in addition to postage.

Portal Access – Electronic copies of recently completed personal tax returns will be uploaded after your return has been accepted by IRS. These copies are available for you to download and maintain for your records. They will be available for download for **60 days**. After your time has expired, we can provide copies (pdf or hard copy) for **$35** for each copy per year.

Dear Client,

As the year winds down, the tax reporting forms begin to arrive, and we want to remind you which ones we need you to accumulate and send to us with your tax information. First, there is a **new form, the 1099-K** that many of you will receive this year for things like Ebay or Facebook Marketplace sales, and sometimes for simple cash transfers using a cash between friends app such as Zelle.

If you receive a 1099-K this year please make sure to provide it to us, and be prepared for a phone call and some questions from us so that we can report it properly to minimize income tax or determine the tax does not apply.

We still need the annual information forms that are sent to you for tax purposes. As a reminder, here is a simple checklist:

___ W-2 for wages ___ W-2G for gambling ___ 1099-Int for interest
___ 1099-DIV for dividends ___ 1099-B Brokerage ___ SSA-1099 Social Security
___ 1099-NEC for income ___ 1099-MISC for income ___ 1099-K for income
___ 1099-R for retirement ___ 1099-G for refund & unemployment
___ 1099-Int for mortgages ___ 1098-T for tuition ___ 1099-SA for HSA's
___ K-1 forms for investments in S corporations or partnerships
___ Form 5498 for IRA values ___ IRA and Roth IRA contributions for 2022
___ Child care costs (Name, address, amount and ID # of the recipient)
___ Charitable donations – total amounts and recipients
___ Property tax paid on your home, property or cars
___ Estimated tax payments and dates
___ Any letters you received from the IRS, state or local authorities
___ Our engagement letter

If you have a small business, farm or rental property you can find a checklist for those activities, if needed, at www.elhcopc.com under the TAX tab.

Again, **IRS scrutiny of foreign accounts** means that you need to be absolutely clear about any non-US accounts or income so that we report it correctly.

If you have bought and/or sold a home in 2023 we need the closing statements on both the purchase and the sale, as well as a list of improvements (with cost) for any improvements you made to the old home.

Cryptocurrency activities continue to cause major tax issues for people that believe it is not reportable. Bluntly, **cryptocurrency is taxable**, is reportable, and carries incredible penalties for not reporting, so make sure to discuss it with us if you dipped your toes in that water.

Every year we are reminded of how much we value your business, and we want to once again say thank you. Please contact us with any questions.

Sincerely,

Ellis Lee Hostetter & Co., P.C.