

# Steven A. Phillips

Certified Public Accountant

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Dear friends and clients,

Happy New Year! With the 2023 year ending, it is time to start thinking about taxes again. I hope 2023 was a happy and prosperous year for you.

Enclosed is your 2023 Tax Organizer for gathering information for your 2023 income tax return(s). As you receive your 2023 tax documents, please collect them and keep them with this organizer. These documents include such items as your W-2's, 1099's, 1095's, K-1's, brokerage statements, etc. Your check register may also include pertinent information.

Complete only those schedules that apply to you. If you have already prepared other schedules with the necessary information, refer to them in the organizer and enclose them for my use. A fully completed organizer lessens the likelihood of omissions from your tax return.

Make your appointment early as my sit-down appointments are limited. If I have done your taxes before, you may drop them off instead of making a formal sit-down appointment and I will contact you to discuss any questions or issues I may have while preparing your tax return. If I do not receive the information necessary to prepare your tax return by March 5<sup>th</sup>, 2024, or if there are unresolved tax issues or delays in processing, I cannot guarantee that your taxes will be finished by April 15<sup>th</sup>, 2024 and an extension may need to be filed. If you have a business entity with a due date of March 15<sup>th</sup>, 2024, we will need all necessary information no later than February 1<sup>st</sup>, 2024 to complete filing before the deadline without extension. **If it becomes necessary for you to file an extension, it is your responsibility to contact and notify us of your intention to file an extension as well as if you desire to send payment with your extension. If you file an extension, please note I will need your information by August 15<sup>th</sup>, 2024 to allow the necessary time to prepare your tax return.**

Please note I will not be able to electronically file your return until the E-file authorization forms are signed and payment is received for your tax return.

Also, please check out our website at [stevephillips CPA.com](http://stevephillips CPA.com)!

**Please note that the fee for preparing your tax return is due at the time services are provided. If your bill remains unpaid after thirty days it will be assessed a 10% late fee for each portion of a month it remains unpaid. Additionally, my insurance company requires that I obtain a signed engagement letter in order to prepare your tax return. One has been enclosed in your packet. Please sign and return this form to my office along with your completed organizer making sure to provide all current contact information (address, phone number, and email address). This is necessary for me to prepare your tax return.**

Throughout the year we realize that you may need additional copies of your return either in hard copy form or emailed to you in .pdf format. We are happy to provide additional copies upon request for a \$25.00 fee. Please note that unless we have a signed authorization form from you, we are not allowed by law to provide copies of your tax returns to any third party.

I look forward to hearing from you soon. As always, please contact me if you have any questions.

Respectfully,



Steven A. Phillips, CPA