



## **Tax Year 2023 Client Letter**

Dear Client,

The 2023 Tax Organizer will assist you in collecting and reporting information necessary for us to properly prepare your 2023 income tax return. Please complete the organizer sections as appropriate and provide supporting documentation where necessary. If you received W-2s and/or 1099s you do not need to transpose the information to the tax organizer, providing the tax forms is sufficient. Prior year data is included on the organizer sections for your reference.

All tax returns will be provided in the form of a PDF file through SmartVault. Paper copies of tax returns are available upon request.

**Please be sure to include the following documents when you send in your information:**

- 1. Information Checklist - All applicable items**
- 2. Signed Engagement Letter (MANDATORY) - We cannot start your return without it!**
- 3. Completed Questionnaire (MANDATORY) - We are searching for deductions!**

For your convenience effective January 1, 2024, our office hours during tax season will be as follows:

**Monday-Friday 8 am - 5 pm**

If you have any questions or if we can be of assistance in any way, please do not hesitate to call.

Sincerely,

Devon A. Gaines, CPA, PC