



Anna Nalls CPA PC

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January 20, 2024

Dear Client,

It is this time of the year again! I hope that you had a wonderful holiday season. Enclosed please find 2023 engagement letter. Please read, sign it and return it to us along with the attached Questioner and your 2023 tax information, including but not limited to the following:

- Form(s) W-2 (wages, etc.)
- Form(s) 1099 (interest, dividends, etc.)
- Schedule(s) K-1 (income/loss from partnerships, S corporations, etc.)
- Form(s) 1098 (mortgage interest) and property tax statements
- Brokerage statements from stock, bond or other investment transactions
- Closing statements pertaining to real estate transactions
- Form(s) 1099-K (Merchant Card and Third-Party Network Payments)
- Any tax notices received from the IRS or other taxing authorities.

As in prior years, Organizers are available for download on our website www.annanallscpa.com or can be emailed/mailed to you upon request. If you would like an Organizer, please call or email me – amn@annanallscpa.com. Please note that completing an Organizer is optional, however, it can be used as a checklist to assist you in collecting and reporting information for the proper preparation of your income tax returns.

We reached out to you in a separate email regarding compliance with Corporate Transparency Act (CTA) and Beneficial Ownership Information (BOI) reporting requirements. Please make sure to get familiar with the subject. Additional information is available on our website.

A few notes for this coming filing season:

- Make sure to include a signed engagement letter and completed questioner with your tax information (these two items are not optional).
- Tax returns will be prepared on “first come first served” basis so please get your paperwork to us as early as possible to avoid delays. We can begin to prepare your tax returns even if

you are missing an item or two, and you get the remaining information to us as soon as you receive it.

- Your refund will be delayed if we do not have your current bank information – if your information has changed since last year, please let us know.
- We will not prepare tax returns after April 1st – only extensions and extension payments will be processed after that date.
- Extensions allow for additional time to file your tax returns but not additional time to pay your taxes. Tax payments are due April 15th and have to be submitted with your extensions. Penalties and interest may apply to taxes not paid by that date.

We appreciate our relationship with you, and we want to do our best to guide you through this tax season with as little stress as possible.

As always, thank you for your loyalty and your continuing business. We look forward to hearing from you.

All the best in the New Year!

ANNA NALLS CPA PC

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Enclosure