

The McKillip Group Inc
(303)688-8680
jodi@castlerockcpas.com

2023 Tax Return Preparation

PLEASE READ

January 06, 2024

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We hope you are doing well! **It is time to prepare your 2023 tax returns.**

Tax Organizers: We have prepared and uploaded your 2023 tax organizer to your client portal to help you gather the documents and other information needed to prepare your tax returns. If you did not receive a tax organizer and you want one, please call our office.

Delivery of Tax Information: There are three ways to deliver your tax information to us.

- 1. Client Portals (Preferred):** Your information may be received via the web using your secure client portal. You can access your portal through our website at www.CastleRockCPAs.com under the "Client Resources" tab then selecting "Client Portal." **Please submit one file if possible. We are notified by email every time you upload a separate file.**
- 2. Appointments:** Standard tax appointments are scheduled for 30 minutes. Please schedule appointments on our website at www.CastleRockCPAs.com under the "Client Resources" tab then selecting "Scheduling" or call the office. **Appointments are limited. We will not be taking appointments from March 1-15 or April 1-15.**
- 3. Mail In or Drop Off:** If you are comfortable mailing in or dropping off your tax information, you may do so without an appointment. We will scan and return all documents to you.

Please accumulate your tax information in an orderly manner and submit the information as early as possible. Tax returns will be prepared on a first in first out basis. If you are missing information, it will delay the preparation of your tax return. Please submit all your information at once if possible.

Document Organization: Due to the amount of time spent gathering and organizing clients tax documents, we respectfully request that you use the following guidelines when submitting your information in an orderly manner:

1. Use the organizer as a guide to organize your documents and make sure there is no missing information.
2. We prefer summaries vs actual receipts.
3. Remove all staples and paper clips.
4. Please take all your documents out of the envelopes.

Please be sure to include the following documents when you send in your information: These documents are mandatory. We cannot start your return without them!

1. Signed Engagement Letter, and
2. Tax Questionnaire- We are also searching for deductions!

Deadline for Submission of Tax Information:

Business tax returns are due March 15th and Individual tax returns are due April 15th. **We need a minimum of 4 weeks to prepare your tax returns. We are happy to file an extension if you need more time.** We do our best to get your tax return done as quickly and accurately as possible. **Tax returns are prepared on a first in, first out basis.** If you are missing information, it will delay the preparation of your tax return.

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

Monday - Friday	8 am - 5 pm (Closed for lunch from 12-1)
Saturday	9 am - 12pm (by appointment only)

New This Year:

Employee Retention Credits:

This firm does not file for Employee Retention Credits (ERC) or advise on the eligibility of these credits. Please provide information regarding receipt of these credits. The receipt of these credits may require filing amended tax returns from prior years.

New-Corporate Transparency Act (CTA):

On January 1, 2021, congress enacted the Anti-Money Laundering Act of 2020 which established the Corporate Transparency Act (CTA). Mandated by the act, beneficial ownership reporting requirements will be phased-in beginning January 1, 2024. We have additional information at our office regarding the CTA which we can provide per your request.

We Notarize! This is a service we offer to our clients free of charge.

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

We appreciate your trust in our business.

Sincerely,

Jodi A McKillip CPA
The McKillip Group Inc