

Hello and Happy New Year!

Newsletter for Tax Season 2023 – Post Covid series 😊

INTUIT LINK: It's time once again to start gathering your tax documents. New this year is Intuit Link which is going to be my new document sharing portal. We will continue to use Smart Vault this year, but it will begin to be phased out by year end. I will be sending you a link this week to get Intuit Link set up. One big benefit of Intuit Link is it provides you a list of the exact documents you had the year before so it is easy to know what to look for. I think you will enjoy using this new portal.

SMART VAULT: If you wish to use the Smart Vault portal again this year, here is the link to access this. You should have your own login for this.

<https://my.smartvault.com/secure/SignIn.aspx?ReturnUrl=%2fusers%2fsecure%2fHome.aspx>. If you have forgotten your password, you will need to reset it. I do not have this information.

THE OLD-FASHIONED WAY: If you do not want to use either portal, that is fine. Just email or call me when you have all your documents assembled, and we can schedule an appointment for you to get started.

QUESTIONNAIRE: Please complete the annual questionnaire as in prior years. It is brief and essential to help me make sure all relevant information gets included. These questions are in addition to the questions asked within Intuit Link. If you are using Intuit Link, this document is in your portal. It can also be found on my website. Please click here to access it: <http://www.mshtax.com/links.html>

ENGAGEMENT LETTER: Please print, sign and return to me the annual engagement letter. If you are using Intuit Link, this document is in your portal. It can also be found on my website. Please click here to access it: <http://www.mshtax.com/links.html>

ORGANIZER: If you would like to get a personalized organizer with your prior year data proforma'd to assist you in gathering your data this year, please email me, and I will get one to you right away.

MSH TAX WEBSITE: Do you ever wonder what the tax rates are or contribution limits to your retirement plan or Health Savings Account are among other things? These can also be found all in one place by downloading the "Key figures" link on my website. There is a lot of other great information including summaries of recent tax legislation on my website so check it out! www.mshtax.com

It is our goal to prepare your tax returns accurately and as timely as possible. To help us with this process, please try to submit all of your tax data as soon as it becomes available. If we do not have all of your tax return data by March 15, we cannot guarantee that your tax returns will be completed by April 17 although we will do our best. In the event that we need to extend your tax return, we will estimate the amount of taxes you will need to pay by April 17 and file your extension electronically. Work on extended tax returns will resume in late-May.

Keeping you informed, is a high priority for me because I don't always know what to ask you. If you have questions and want to schedule any additional time to go over these, just let me know and we can schedule a chat via zoom, phone, in person, email, etc.

Looking forward to working with you again this year, and I thank you for your continued patronage.

Yours Truly,

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