

Hello and Happy December 😊

We hope you all have had a wonderful year, and we are looking forward to servicing you all again in the New Year!

**We will be outlining a couple of very important changes so please read thoroughly.**

If we have an email address on file for you, you should have received our newsletter regarding our new online secure portal. **The old portal has been deactivated.**

We are implementing a new portal platform. The portal allows us and you to upload documents, it gives the ability to send/receive messages, electronically pay your tax preparation fee as well as electronically sign your tax documents.

Another great feature this year is you all will receive a personalized questionnaire and tax preparation checklist rather than a generic form attached to this letter.

You may still drop off your documents to us in person during normal business hours.

**If you would like to electronically sign your tax returns, you MUST be on our new portal!**

If you did not receive our portal newsletter and/or have not received the welcome activation email, please reach out to us so we can get you set up.

---

Another important change we are trying this year is how we will be handling appointments. We enjoy seeing everyone and want to continue serving you in a personable small business atmosphere. In order to accomplish this, we are going to try streamlining the tax preparation/appointment process. If we need to reevaluate this, we absolutely will.

Taxes will no longer be completed in person while you wait. Once ALL your documents are received and we have your tax return prepared we will reach out to you to either review it with you via phone or an appointment will be scheduled for you to come in person to review and sign your tax return.

With that being said, we understand each person's circumstances are different and we will do our best to accommodate any special circumstances. If you feel you need an appointment to come in and meet with Kim please contact us via portal, email, or phone to discuss.



Clients will be completed on a 1<sup>st</sup> come 1<sup>st</sup> serve basis. (Ex: If you upload/mail some of your tax documents but are waiting for other documents, your tax return will **NOT** be started until we receive **ALL** your documents and will then be completed on 1<sup>st</sup> come 1<sup>st</sup> serve basis)

So, to recap, documents can be submitted in person, uploaded to the portal, or mailed to us. Clients will be served on a 1<sup>st</sup> come 1<sup>st</sup> serve basis. Appointments will be for review, signatures, and pickup only. We will no longer complete your tax return while you wait. If you have a special circumstance, please reach out to us so we can accommodate your needs.

### **\*\*\*DEADLINE DATES\*\*\***

The deadline dates outlined below will help us better serve you!

**Due by 1/19/2024** – all 1099s and/or W2 payroll information for clients needing to send these out to their employees and/or vendors.

**Due by 2/16/2024** – S-Corporations and partnership information to have a timely filed tax return. **Any information received after Feb 16<sup>th</sup> will automatically go on an extension.**

**Due by 4/5/2024** – C-Corporations with a fiscal year end date, personal tax returns, and trust tax returns. **Any information received after April 5<sup>th</sup> will automatically go on an extension.**

### **\*\*\*UPDATES\*\*\***

- ❖ **CONTACT OPTIONS:** (Below are the **ONLY** means of contacting us, please make sure you have the correct contact information)
  - **Portal**
  - **Email:** [kim@kimstaxservice.com](mailto:kim@kimstaxservice.com) or [katherine@kimstaxservice.com](mailto:katherine@kimstaxservice.com)
  - **Phone:** (518) 631-4588
  - **Mailing Address:** 133 Saratoga Rd, Suite 2 Glenville, NY 12302
    - **PO BOX HAS BEEN DISCONTINUED**
- ❖ If you had Kim's personal cell phone number ending in 0849 that number is no longer active and available for use. Please contact her at one of the above options.
- ❖ We **CANNOT** take your tax preparation fee from your tax refund!
- ❖ **Payment is due in full at the time of service. We will NOT transmit your tax return until payment is received!**

**Reminder:** Your personalized tax preparation checklist and questionnaire will be on your portal account to complete.

We appreciate all of you and are so grateful for your continued support and trust in handling your tax needs.

