

January 20, 2022

Dear Client:

As your trusted advisor, it gives me great pleasure to provide advice and assistance to your most important matters.

Wishing you and your family a safe, healthy 2022.

2021 Tax Preparation

Timing/Schedule

Please provide your tax information by March 18, 2022, so that we can complete your tax returns by April 18, 2022 (Tax Day). Should you face a timing problem, we will provide a solution.

Your 2021 tax organizer (planner) will be sent securely

LeapFILE Secure File Transfer Service and will read Incoming files from gary@russikoffllc.com.

Highlights/Notes:

Tax Organizer:

Sign and date your tax organizer.

Provide all 2021 tax documents. If you are unsure of applicability, give it to us, we will determine use.

Moved/changed your state of residence provide the dates and timeline by state.

Confirm/add/update driver's license information on personal information page.

Received an Identity Theft Protection Pin from the IRS- forward this letter to us. Your tax return cannot be e-filed without this pin number.

Confirm the accuracy of your bank information- routing and account number.

Update (if required) the personal information sheet (verify social security numbers, address and birthdates; add/delete dependents, if necessary, etc.). Verify/update all contact information on the cover sheet. Provide your e-mail address and cell phone number.

Closed accounts- (a bank/financial account that was open/active), on your tax organizer, please indicate if it was closed in 2020 and there will be no tax document in 2021.

Tax document exists - you do not have to enter these amounts into your tax planner. Simply make a reference – “see tax form included.”

If no tax document exists – fill in the amounts; for example- a bank account - interest earned is less than \$10.00; unreimbursed medical expenses, charitable donations, etc.

Economic Stimulus Payment received in 2021 – you will receive Notice 1444-C – send this to us.

Advance Child Tax Credit- we require dates and amounts of the payments received during the year (advances began July 15, 2021).


<https://www.irs.gov/credits-deductions/child-tax-credit-update-portal>

Foreign bank account(s) – Require special reporting – provide:

- a. Maximum balance at any point during 2021
- b. Balance at December 31, 2021

Residential energy improvements, bought an electric car, installed solar panels, other large purchases provide invoice(s).

Very truly yours,
Russikoff LLC



Gary L. Russikoff