

January 31, 2024

Dear Client:

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

Wishing you and your family a safe, healthy 2024.

2023 Tax Preparation

Timing/Schedule

We must receive all information by March 18, 2024, to complete your tax returns by April 15, 2024.

Communicate promptly if you will be unable to provide your tax information timely.

Upgrades for 2023:

The 2023 tax process has been streamlined.

2023 Tax Organizer and document upload fully electronic.
We will be providing your link to LOGIN to "My 1040Data Toolkit" securely in a LeapFILE email.

**All of your 2023 tax documents must be uploaded into My 1040Data Toolkit - your personalized online tax organizer.

Additionally:

Change in employers, indicate in your organizer; confirming correct W-2 reporting.

If you have relocated / change in state of residence - provide all move in / move out dates by state.

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

Identity Theft Protection Pin from the IRS- upload this letter to your kit. Your tax return cannot be e-filed without this Pin number.

Confirm the accuracy of your bank information- routing and account number. Upload a VOID check.

Verify your personal information (social security numbers, address and birthdates; add/delete dependents, if necessary, etc.). Confirming accurate contact information, providing e-mail address and cell phone number.

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

**Interest/dividends with No 1099- please provide 2023 statement showing the 2023 total.

Closed accounts- (a bank/financial account), please indicate if it was closed in 2022 and there will be no (income) tax document in 2023.

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

- a. Maximum balance at any point during 2023.
- b. Balance at December 31, 2023.
- c. Upload statements.

Estimated taxes – upload - we must be notified of dates and amounts. Provide confirmations and/or cancelled checks.

If you had virtual currency (e.g., Bitcoin) and other digital assets (e.g., NFTs) activity during the 2023 tax year, you may be subject to tax consequences associated with such transactions and may have additional foreign reporting obligations. We must be provided with ALL transaction detail.

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

Real estate (buy/sell/refi) transactions – upload documents(s) – HUD settlement statement.

Very truly yours,
Russikoff LLC



Gary L. Russikoff