

2023 TAX PREPARATION PROCEDURE

Another tax season is upon us! We continue to make improvements to our procedures in an effort to make preparation and completion of tax returns as streamlined and easy as possible. We ask for your cooperation to help make this process run smooth.

Please review the items under the "DOCUMENTS" tab of the website. The **2023 TAX TIPS** will assist with the preparation of your paperwork.

FOR 2023 SEASON: Many of you are already using the Protected Xchange from last tax season. We encourage all of you to take advantage of this option in the upcoming season by creating an account. You may access it from the website in the bottom left corner "send us a file" or use this link:

<https://www.protectedxchange.com/cpagallo/login>

If you have a smartphone or tablet, you can use the portal. **No scanner or printer is necessary**; only a free app on your phone/tablet (see resources below). More importantly, we get an email notification when you send documents which is very helpful to us.

I'd be happy to help anyone through January learn how to send documents digitally and securely. Please call the office and we'll make time to get you started.

We are no longer using NetClient for document upload as there are too many login issues.

Call the office before you drop off/email/upload or mail your tax documents for review and processing. Once your documents are processed, we will connect with you either by phone or email to advise if additional information is required and if we need to schedule time to review and finalize your return. We can no longer prepare returns in person as the process has become too lengthy due to the complexity of tax law changes and we expect ongoing tax changes due to the ongoing COVID-19 crisis.

Pursuant to IRS guidelines, you will need to sign your 8879 form for electronic filing and any others necessary, **BEFORE FILING YOUR RETURN**. This form will be generated only at the completion of your return and will be sent via email. Verbal authorization **will not** be accepted.

Payment is required at the time your return is completed. Cash, check and credit cards are accepted. A Square link for online payment will be generated at the completion of your return for convenient private online payment.

Once signatures and payment is in place, your return will then be filed. Hard or paper copies will be done on request only in an effort to keep costs down as the cost of paper as well as postage continues to rise.

IF YOU RECEIVED YOUR RETURNS BY EMAIL BE CERTAIN TO DOWNLOAD AND SAVE IT SO YOU HAVE THE INFORMATION SHOULD YOU NEED IT IF WE ARE NOT IN THE OFFICE. RETAIN 7 YEARS OF TAX DOCUMENTS.

Resources you may find helpful:

Free Apps for your phone or tablet will allow you to take pictures of your documents and email or upload to whichever destination you choose. These are available for both IOS and Android systems.

Genius Scan (PREFERRED) allows you to take photos and convert them to PDF's and also view and sign documents you receive by email.

Abode Scan allows both the ability to scan and read documents and sign and return them after returns are completed.

Other apps clients like are **CamScanner**, **MileIQ** to track mileage (subject to software fee).