

TIPS TO EXPEDITE PREPARATION OF YOUR 2023 TAX RETURN:

1. **DO NOT** SEND PHOTOGRAPHS OF DOCUMENTS WITHIN YOUR EMAIL. THEY ARE NOT COMPATIBLE WITH OUR SOFTWARE AND DO NOT PRINT OR SCAN. PDF'S ARE BEST. THERE ARE EXCELLENT APPS FOR YOUR PHONE THAT ARE FREE THAT WILL CONVERT YOUR PHOTOS TO PDF'S. GENIUS SCAN IS PREFERRED.
2. **DO NOT SEND UNOPENED MAIL. REMOVE YOUR DOCUMENTS FROM THE ENVELOPES AND DO NOT STAPLE YOUR DOCUMENTS.** ALL DOCUMENTS ARE SCANNED, SO THEY WILL ALL BE REMOVED.
3. **DO NOT** PUT POST IT NOTES ON YOUR DOCUMENTS. PLEASE LIST ALL QUESTIONS AND CONCERNS ON A SEPARATE SHEET OF PAPER. DOCUMENTS DO NOT NEED TO BE LABELED.
4. IN ADDITION, WE RECOMMEND THAT CLIENTS WITH BROKERAGE ACCOUNTS SIGN UP FOR ELECTRONIC DELIVERY OF THOSE DOCUMENTS. I'D BE HAPPY TO HELP YOU UNDERSTAND HOW TO DOWNLOAD AND SAVE THESE DOCUMENTS TO YOUR PHONE/TABLET/COMPUTER AND UPLOAD THEM TO THE PORTAL TO MAKE SUBMISSION OF DOCUMENTS AT TAX TIME A LITTLE LESS PAINFUL.
5. TOTAL YOUR MEDICAL (INCLUDE DENTAL AND EYEGLASSES/CONTACTS), PREMIUMS AND PRESCRIPTION RECEIPTS AND PROVIDE THOSE TOTALS ON PAPER. **DO NOT SEND** ALL YOUR INDIVIDUAL RECEIPTS. MAINTAIN RECEIPTS FOR YOUR RECORDS.
6. DONATION LETTERS FOR CONTRIBUTIONS GREATER THAN \$250 TO ANY ONE CHARITY ARE REQUIRED BY THE IRS TO CLAIM THE DEDUCTION. **DO NOT** SEND YOUR RECEIPTS FOR CHARITABLE DONATIONS BELOW \$250 EXCEPT FOR CAR DONATIONS. LIST YOUR DONATIONS ON A SHEET OF PAPER. FOR CAR DONATIONS, PLEASE INCLUDE THE LETTER YOU RECEIVED FROM THE ORGANIZATION.
7. PLEASE INCLUDE A VOIDED CHECK TO PLACE IN YOUR TAX FILE FOR REFUNDS AND/OR PAYMENT TO THE GOVERNMENT. **PLEASE PROVIDE AN EMAIL ADDRESS AND ADD US TO YOUR CONTACTS TO PREVENT OUR COMMUNICATIONS FROM GOING DIRECTLY TO SPAM.** HOTMAIL ACCOUNTS ARE NOT COMPATIBLE.
8. RETURNS ARE PROCESSED IN THE ORDER RECEIVED AND ARE ASSIGNED A NUMBER. THE EARLIER, THE BETTER! WE CAN USUALLY PROCESS APPROXIMATELY THE FIRST 350-375 RETURNS RECEIVED BY THE APRIL 15TH DEADLINE **IF WE HAVE ALL THE DOCUMENTATION NEEDED.** EXTENSIONS WILL BE FILED AUTOMATICALLY AS NEEDED AND FOR ALL INCOMING DOCUMENTS RECEIVED ON AND AFTER MARCH 1ST. **EMAIL/PORTAL IS PREFERRED** AND DROP OFF IS ACCEPTED. SECURE PORTAL OPTION IS AVAILABLE THROUGH OUR WEBSITE (SEE TAX PREPARATION PROCEDURE) WWW.CPAGALLO.COM. IF YOU HAVE QUESTIONS, EMAIL ANGELO@CPAGALLO.COM OR BARBARA@CPAGALLO.COM OR CALL 973-636-2800 TO ADDRESS ANY ISSUES BEFOREHAND.
9. IF YOU WOULD LIKE TO RECEIVE A TAX ORGANIZER (YOUR PREVIOUS YEAR'S RETURN TO USE AS A GUIDE), PLEASE CALL 973-636-2800 OR EMAIL BARBARA@CPAGALLO.COM AND ONE WILL BE SENT TO YOU. DO NOT RETURN AN UNFILLED ORGANIZER TO THE OFFICE. IF YOU DECIDE NOT TO UTILIZE IT, JUST DISCARD IT. A SIMPLIFIED GENERIC VERSION IS AVAILABLE ON OUR WEBSITE IN THE DOCUMENTS TAB.
10. IF YOU ANTICIPATE YOU WILL OWE THE IRS OR THE STATE IN WHICH YOU FILE, PLEASE LET US KNOW AHEAD OF TIME AND WE WILL INSTRUCT YOU ON HOW TO MAKE A PAYMENT ESPECIALLY IF THE RETURN CANNOT BE FILED ON TIME. EXTENSIONS ARE FOR FILING PURPOSES ONLY, NOT MONIES OWED.