

S.K. Income Tax & Accounting

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& North Branch, MN 55056 (651) 460-0550

Here comes Tax Time! We hope you are enjoying your Holiday Season and are getting ready for "The most wonderful time of the year" Tax Season.

We are making your personal tax organizers available (for free) to anyone that requests one, please call or email us to receive your 2023 tax organizer. We also have the secure portal, if you wish to use the portal, please email us and we will send you a 2023 invite. Email us at SK-IncomeTax@comcast.net.

You will find our annual engagement letter and Property Tax Credit letter included with this letter. Please sign and return it to us with your tax information. Do Not bring this in prior to dropping off your return information.

We still need the annual information forms that are sent to you for tax purposes. As a reminder, here is a simple checklist.

- W-2 for wages, W-2G for gambling, 1099-int for interest
- 1099-Div for dividends, 1099-B for Brokerage, SSA-1099 Social Security
- 1099-NEC for income, 1099-Misc for income, 1099-K for income
- 1099-R for retirement, 1099-G for refunds & unemployment
- K-1 forms from investments in S corporations or partnerships
- Form 5498 for IRA values, IRA and Roth IRA contributions for 2023
- Childcare costs, and the name, address, amount, and of the recipient
- Charitable donations-total amounts and recipients
- Property tax paid on your home, property, or cars
- Estimated tax payments and dates paid Including state payments.
- Any letters you received from the IRS or state tax authorities.
- **Our engagement letter signed by you and your spouse.**

Again, IRS scrutiny of foreign accounts means that you need to be clear about any non-US accounts or income so that we report it correctly.

At any time during 2022, did you: (a) receive (as a reward, award, or payment for property or services); (b) sell, exchange, gift, or otherwise dispose of a digital asset (or financial interest in a digital asset)?

Childcare providers remember we will still need our Childcare organizer completed before we can work on your returns. Print your organizer at www.daycaretaxhelp.com.

We are asking if you are filing a business return with a Schedule C or Rental Property with a Schedule E to please have ALL your tax information into us NO LATER THEN March 28 to ensure we can complete and file in a timely manner. We may need to file an extension if you are unable to do so.

Corporate Returns need to be in by February 28 to meet the March 15 Due Date.

As always, we are here to answer your questions. Please don't hesitate to call or email us. Everyone has been enjoying our new Zoom meetings as well.

Every year we are reminded how much we value your business, and we want to once again say thank you. Please call us with any questions.

Sincerely,

Sue Weller, EA

Diane Knie, Tax Preparer

Jessica Zitzman