

Dear Client,

January 2024

Happy New Year! Best wishes to you and your loved ones in 2024!!

A few years ago, we introduced our new upload and information delivery process for tax preparation, and we are happy to report that most of you have embraced the changes in efficiency and we appreciate your patience and efforts in making it a success. We will continue to provide you with the best service we can in the most effective way for everyone.

This year we have improved our client portal and E-signature systems, so you will receive an email with the new login information for your client SmartVault. **Watch for an email from SmartVault with the link and instructions on how to set up your new secure, information exchange vault.** (*We are no longer using FileShare*). You can also find the new SmartVault link at www.mytaxladyrocks.com. Once the return is completed you will receive a final review with the efile signature request (Form 8879) via DocuSign (*We are no longer using RightSignature*). The upgrades should be pretty seamless and will allow our back-office process to save time, which can save you money.

Speaking of the office, the gang is all here – and we have added another awesome person. Melissa Larsen comes to us with five years' experience of working in a tax and accounting office. Melissa is our Front Desk receptionist, and between her and Dalene, they keep the office running smoothly. Dalene has finished her thirteenth year with me and is still going strong, but she too has had a bit of change in her office duties and processes, so Melissa is here to help. I can't say enough of how great it's been to have Dalene be part of Wasatch Tax for so long - So here is a big THANK YOU DALENE!! You rock, you are awesome, your work and loyalty are so appreciated! As for me and Bryan, we continue our focus of tax law, tax preparation and accounting, and luckily, we still love what we do. We are constantly striving to deepen our knowledge to help you navigate the tax options to best benefit you. When we say how long we have been at this, it makes us sound old (*and some reality I try to ignore - LOL*), so just know that our many years of experience and training add up to a lot of good stuff to help you succeed.

As always, I am the final preparer to complete your tax return. You are welcome to schedule a 30-minute "Wrap-up Final Review" appointment – in the office or on the phone, once we have everything needed to get through your return. We must have all your data at least 10 days in advance of your desired wrap-up appointment time. And just a reminder: for us to begin your tax return, the enclosed green Tax Prep Agreement (*on the back of this letter*) and all pages of the yellow Questionnaire must be completed and uploaded with your tax information.

No year is the same as the year before; so, between tax law changes or your own life events, forms and filing requirements will be different – which is why we are here to help. As you can imagine, each return is different, and you will receive the personalized and specific service needed for your return. Your final tax preparation fee will be based on all the forms and worksheets needed to prepare an accurate return. The 1040 (itemized) with Utah state return base fee will start at \$325, plus whatever other forms and worksheets are needed to reflect additional income, deductions, credits, etc. Business returns and trusts will start at \$650 and single member LLCs start at \$400. (*Accounting, audit representation, research, consultation, and tax planning are all separate services and are not included in tax preparation*).

Just a reminder, we will not do "rush" work. If we have not received ALL your information in a timely manner, an extension will be filed and we will do our best to estimate if you should pay anything and we will provide a payment voucher if needed. An extension of time to file a return is NOT an extension of time to pay taxes. 2023 tax balances must be estimated and paid by April 15, 2024. **If you have not provided any tax information to us but would like us to submit an extension for you, we must receive your extension request IN WRITING via email no later than April 11th.**

If you have any questions, please feel free to contact us. Thank you for your continued business and trust. We are all looking forward to helping you out soon.

With friendship and gratitude,

Neala

P.S. WATCH FOR AN EMAIL FROM SMARTVAULT TO CONFIRM YOUR NEW CLIENT PORTAL.