

Dear Client:

January 13, 2023

2022 Tax Filing Season is here! We know that recent years have been, well, interesting for most people, including us. We have implemented some new behind-the-scene procedures and plan more enhancements for 2023. We are excited to bring these improvements, which should increase our efficiency, to you!

You will notice this information repeated often. As you begin receiving the documents for the 2022 tax filing, put them all together in one place. **Please open all your tax documents** (W2s, 1099s, 1098s, etc). **Discard the envelopes, unfold the documents and lay everything out flat in the order on "What to Drop Off" page and DO NOT STAPLE pages.** This helps ensure you have all your documents. Last year, we received numerous unopened envelopes clients thought were W2s only to reveal they were health certificates and mortgage statements that were escrow statements, and even a few checks. So you see, if you do not open your envelopes you might not have the tax documents needed to prepare your return. This wastes time and will cost you extra money. Also, please remember, some businesses require you to log in to their website to download your tax papers.

The enclosed packet has been prepared to assist you in gathering information for your 2022 tax return. Review the entire packet and answer any questions that apply. We know this can seem cumbersome, but this information is imperative for us to create accurate tax returns. **As such, we cannot begin working on your return until we have the enclosed Engagement Letter signed and the rest of the Organizer completed and all supporting tax documents.**

In order to ease your tax season preparation, there are some documents that we do NOT need! For any deduction you have, you do not need to send us copies of your receipts - just a summary or total expense is sufficient. This is especially important for medical expenses. Your medical receipts can include very sensitive and personal information, so please do not send those to us. We also do not need the documents labeled (W-2, Interest, etc).

While we do make an effort to accommodate clients of varying tech-savvy levels, our firm is based on a fully virtual model. **As such, we strongly encourage all clients to use our secure portals as much as possible.** The portals can be found by visiting www.Simperstax.com. If you prefer to provide physical documents, **you may use one of our drop boxes.**

Some important things to consider with your tax documents:

- *Form 1098-T (tuition) is filed on the parent's return, if the student is a dependent.
- *Email is NEVER secure! You should **never email sensitive information**, including ANY tax documents.
- ***Our portals, Verifyle or SecureFilePro are secure**, and are also the first messages we respond to each day.
- *Please try to **upload all your files at once**. When sent in "bits and pieces" it can become confusing for all of us.
- *If taking a photo of documents on your phone, please make sure to save/convert to **.pdf**
- ***Please include a list of all documents you are uploading**

We look forward to an exciting and efficient 2022 tax! We appreciate your trust in our business.

Sincerely,

Anita

Anita C. Simpers
Anita C Simpers EA

Hours we engage with clients:

Monday, Tuesday & Thursday 9 am – 6 pm

Friday & Saturday 9 am – 3 pm