

## Happy New Year 2024!

We hope the holidays have treated you well. As of this year there will be new procedures. All clients will require an appointment to drop off and pick up returns. Tax returns will no longer be completed in one session. Dropping off tax documents will no longer be accepted without an appointment. We are implementing this for quality control and improved standards for clients. Our apologies for any inconvenience that may occur with these new changes.

Each year companies take longer to mail the appropriate tax information and statements to complete tax returns. Please include all the necessary materials and information needed to complete the return. There is an income tax organizer provided online at ([pmtaxandaccounting.com](http://pmtaxandaccounting.com)) also, we have hard copies available upon request. We strongly recommend it for guidance to ensure documents are not excluded. Digital Wallet Transactions (I.e., Venmo, eBay, PayPal, etc.) may be subject to claimable income. If applicable, you will receive a 1099-K which should be included with your tax information.

For any reason that you have been issued a PIN by the Internal Revenue Service in the past, a new PIN will have to be provided for electronic filing. You will have to contact the Internal Revenue Service for that PIN.

To avoid mailing delays or loss of information, we have a secure portal through Canopy which you can upload your documents to, contact us for an invitation. All documents received after April 1<sup>st</sup> will be filed as an extension. Tax returns will not be completed after that date.

The hours will remain the same as previous years:

- Monday thru Friday 8:00am to 7pm (Last appointment being at 6:30)
- Saturday 8:00am to 3pm (Last appointment being at 2:30)

Scheduling is now available online

**Dependent in College** - Include a Form 1098-T, along with a statement of bills paid that is generally issued from the University or College. It is often mailed to the student and not to the parent. It may also be online through the school website. This is needed to file your return claiming the child tax credit; earned income credit; American Opportunity Credit; Head of Household; additional credits may apply.

**Healthcare Premium Tax Credit** - include Form 1095-A to complete tax return. Without this form, the return will be rejected and must be reprocessed at the client's expense. Refunds will be held until the form is provided.

**Facebook** – Check us out on Facebook! Weekly posts about tax & accounting updates will be provided along with another way to get ahold of us.  
<https://www.facebook.com/pmtaxandaccounting>

Please bring an updated driver's license when you pick up your return. Also, this year, filing of a return will not be completed unless E-Filing sheets are signed, and payment is received at pickup.

We are looking forward to seeing you soon and wish everyone a healthy and prosperous new year.

Cordially,

James Bielawski, Enrolled Agent