HETTICK
ACCOUNTING & TAX

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Dear valued client,

Tax season is upon us! We have enclosed our 2022 **Business** Tax Organizer Packet to help you gather your tax information – instructions are on page 2. **Please read and review each document** carefully as requirements, terms of service, and best practices change every year!

For the 2022 tax season, the tax code continues to be as complex as ever and the IRS struggles to keep up with all the changes and previous years backlog. We do our best to stay on top of it for you! The time, knowledge, and expertise needed to prepare federal income tax returns continues to grow. We pride ourselves on quality, thorough work and supporting our tax clients throughout the year; therefore, it is essential for you to note our business tax information submission deadline of **March 1st.** To ensure your return is complete for timely filing, including extensions, **we must receive your complete tax information by our deadline, March 1st**.

The 2022 IRS tax filing deadline for Partnerships and S-Corporation returns is March 15th, 2023. The deadline for Schedule C sole proprietors is April 18th, 2023. In order to provide the most efficient service possible, please wait and submit all of your 2022 tax documents <u>at one time</u>. After we receive your complete business tax information, if necessary, we will reach out to schedule a phone, zoom, or in person appointment to review your return.

If you have any questions or concerns, please do not hesitate to contact our office. Thank you for your trust and confidence in our services – we value your small business, and look forward to serving you this tax season!

Sincerely,

Hettick Accounting & Tax Team

Tax Packet Instructions

Your tax packet includes the following items:

- Agreement for Engagement of Income Tax Services* - This agreement confirms that you are engaging our office to prepare your income tax return and confirms you have read and agree to the privacy policy. You must sign and date the agreement letter, where indicated, and return it with your tax information.

- Questionnaire* - The questionnaire provides us with information needed to accurately prepare your business tax return. You must complete this questionnaire and return it to our office with your tax information.

- Client Information – The client information pages (input sheets) are designed to assist you in updating any information necessary for us to properly prepare your income tax return. Please be sure to return these pages with your information.

***Required Items** – *we cannot begin the preparation of your tax return without the signed Agreement and signed Questionnaire.*

Reminders:

1. We need your accounting records for the year, please get us all the necessary reports or give us access to your books (QuickBooks Accountant's Copy or access to QuickBooks Online).
2. To submit your complete tax information to us by March 1st: upload it electronically via our ShareFile system, send by mail, or drop it off. Please wait and submit all of your tax documents at one time!
3. To upload electronically, visit www.hettickaccounting.com or refer to the signature line of a past email from our office for a direct link to our ShareFile system.
4. We do not accept attachments or links in emails; if you would like to submit electronic documents, please use our secure ShareFile system.
5. Your tax return will not be filed until it has been reviewed by you, your e-file authorization form has been signed, and your invoice has been paid in full.