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Welcome to Hettick Accounting & Tax!

We have enclosed our 2022 Tax Organizer Packet to help you gather your information – instructions are on page 2. **Please read and review each document carefully** and complete the attached documents: Organizer, Questionnaire, and Agreement for Services. **Please also provide us with copies of your tax returns for the last 3 years.**

The time, knowledge, and expertise needed to prepare federal income tax returns continues to grow. Our base Individual 1040 preparation fee is $450 and increases with additional forms. We pride ourselves on quality, thorough work and supporting our tax clients throughout the year; therefore, it is essential for you to note our information submission deadline of **March 17th.** To ensure your return is complete for timely filing **we must receive your complete tax information by our deadline, March 17th**.

The 2022 IRS tax filing deadline for individual returns 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 information, we will reach out to schedule a phone, zoom, or in person appointment to review your return. If we do not hear from you by March 17th, we will NOT file an extension on your behalf; you must contact us directly if you need or prefer to go on extension. Keep in mind that the extension is for filing the tax return; taxes are due April 18th regardless of whether you timely file or are on extension.

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 you as a client, 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. If you are filing a joint return, both you and your spouse must sign the agreement.

- Questionnaire* - The questionnaire provides us with information needed to accurately prepare your tax return. You must complete this questionnaire and return it to our office with your tax information. If you are filing a joint return, both you and your spouse must sign the questionnaire.

- Tax Organizer – The tax organizer is designed to assist you in collecting and reporting information necessary for us to properly prepare your income tax return. It also serves as an update to critical information; please be sure to return page 1 *.

***Required Items** – we cannot begin the preparation of your tax return without the signed Agreement, Questionnaire, and Page 1 of the organizer.*

Reminders:

1. To submit your complete tax information to us by March 17th: 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!

2. 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.

3. **We do not accept attachments or links in emails**; if you would like to submit electronic documents, please use our secure ShareFile system.

4. 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.