



Dear Valued Client,

Our team at Wrobel & Associates, CPAs is excited to start the 2024 income tax season/2023 tax filings, and we appreciate the opportunity to help you with your accounting needs. Before we get into changes for the 2024 tax season, we would like to cover some reminders and frequently asked questions.

REMINDERS:

1. OUR OFFICE HAS MOVED! As of January 18, 2024, our new address is:
30 Park Drive Berea, Ohio 44017
2. If there is an additional dependent added to your household, we need a copy of their SS card and date of birth. Also, we will need to know if a 2022 dependent is no longer a dependent in your household.
3. Clients who have itemized in the past, continue to gather those deductions and we will determine which deduction is to your tax advantage...taking the standard deduction or continuing to itemize.
4. Please provide your and your spouse's driver's license, or a copy, if applicable.
5. For direct deposit, please provide a void check. We will not be responsible if you changed banks from the prior year and do not provide us with updated information. The taxpayer should review their banking information on their tax return before signing Form 8879 and returning to our office. Please note- paper check refunds will be delayed longer than those who opt for direct deposit of refunds.
6. QCD (Qualified Charitable Distribution) amount is needed to make necessary adjustments for IRS reporting, if applicable.
7. Unfortunately, many taxpayers were victims of identity theft in past years and have been victims of tax or unemployment fraud. Many taxpayers will receive PIN number via USPS from the IRS. We will need these PIN number notices to electronically file the return.

**** Tax Day is Monday April 15th 2024. We are requesting all documents needed to file your tax returns be delivered to our office before April 1st, 2024. ****

PLEASE NOTE: INCOME TAX RETURNS WILL NOT BE ELECTRONICALLY FILED WITHOUT A SIGNED AND DATED FORM 8879 IN OUR POSSESSION, AND YOUR INVOICE FOR 2023 TAX PREPARATION PAID IN FULL.

Please see the attached Information, 1040 worksheet, and Individual Income Tax checklist for additional required documents.



Frequently Asked Questions

How may I obtain a copy of my tax documents from either a previous year or the current year?

We prefer these requests to be sent via email to our Client Service Specialist Kayte Carlisle at Kayte@WrobelCPAs.com or ContactUs@WrobelCPAs.com. Document requests can also be made by calling our office during normal business hours Monday-Friday 8:00 a.m. to 4:00 p.m. Our non-tax season hours may vary but will be posted on our website at www.WrobelCPAs.com. All taxpayers are provided with copies of their tax returns each year at the time of filing. **Please allow up to two to three business days for all requests to be honored based on request volume.**

Will in-person tax appointments be offered?

We will be offering very limited in-person appointments this tax season. Our preference is to conduct these appointments virtually or via phone call once we have ALL tax documents in our possession. Please call or email Kayte@WrobelCPAs.com to schedule an appointment with our tax professionals.

How do I get my tax documents to you for preparation?

You can mail in, drop off, or upload all tax documents to our secure Client Portal (Canopy). Canopy is the preferred method as it is safe, secure, and user friendly.

If you are not set up with the client portal yet, please call our office or email Sarah at Sarah@WrobelCPAs.com. She will send a Canopy invite to your email. You will just need to access the invite and create a password. The Client Portal allows you to upload tax documents/notices, download digital copies of your return, and pay invoices. ***We request that you mail, drop off, or upload your tax documents once you have ALL necessary tax documents. This ensures that we have all information required to prepare your return and avoid the need for unnecessary amendments.***

How will I receive my completed tax return and my original copies of documents provided?

There is a box on the Client Questionnaire to indicate your preference on how to receive your tax return. The completed tax returns, along with any documents you have provided, may be picked up at our office or mailed out to you. We will contact you when your tax return is completed. We strive, but do not guarantee, to provide the completed tax returns within 7-10 days of receiving ALL necessary documents. Given the complexity of 2023 returns, there may be some delays. If we are not given all the proper tax documents prior to beginning a return, there will be a potential delay in your return being completed. In addition, if we receive a document late, it may cause the need for an amended return to be filed. This may substantially delay potential refunds and result in tax due/penalty notices from various taxing agencies.

If tax documents are received after April 1st, 2024, and you request we mail your returns via FedEx or UPS so you have them on time, shipping charges may apply. We will add this to your bill. If you have any questions upon receipt of your completed tax return, including questions about the filing instructions, please contact Kayte@WrobelCPAs.com or call our office. ***Please note, if documents are received after April 1st, we cannot guarantee that your return will be completed before the deadline.

How will my return be filed?

Once you receive your completed tax returns, please review these filings for accuracy. Once we receive your signed form 8879 and payment for 2023 tax return preparation, we will electronically file your federal and state tax returns. Additionally, we are now able to file RITA returns electronically! We will automatically file RITA returns with your federal and state tax returns (if applicable). Please note, you will still need to submit payment for RITA tax via check. If you are required to file local tax returns for CCA or any other non-RITA locality, we will provide instructions for mailing and payment of city income tax. We will contact you with any filing issues or rejections. We kindly ask that you promptly review your final tax returns and return your payment and signed 8879 at your earliest convenience.

How do I submit payment for my invoice?

We accept payments via credit card, check, cash or ACH payment. A paper invoice will be included with your completed tax return folders for non-corporate clients. Payment can be made over the phone via credit card, in person, mail, or on our website www.WrobelCPAs.com.

As in years past, we kindly request all non-corporate clients provide payment along with their signed 8879 before we electronically file your tax returns. Electronic filing may be delayed without proper payment.

Will prices change?

Please be aware that additional charges may apply if a filed return needs to be amended, revised, reprinted, or cannot be electronically filed due to omission or IRS complexities. You rest assured that any price adjustments or increases will be handled in a fair, thoughtful, and considerate manner. If you have any concerns about the cost to file your return, we will be happy to review your 2023 tax information and discuss pricing prior to commencing work.

How can I ensure my returns are filed in a timely manner?

Tax Day is Monday April 15th, 2024. We are requesting all documents needed to file a tax return be in our office before **April 1st, 2024**. This helps ensure that we will have enough time to properly complete, deliver and electronically file your returns by April 15th, 2024. Under some circumstances, we may **NOT** be able to guarantee a timely filing but will make every effort to extend your filing deadline if documents are received after April 1st, 2024. Please note an extension does **NOT** give you an extension to **PAY** any tax due. **ALL INCOME TAX LIABILITIES (Federal, State, and Municipal) ARE DUE APRIL 15, 2024, REGARDLESS OF AN EXTENSION.** Penalties and interest may apply to tax paid beyond this date.

We will automatically extend prior year clients which we have not received documents. Please also feel free to contact Kayte at our office if you are requesting an extension in advance. **NOTE: Our office will be closed on Tuesday April 16, 2024** so our team may get some rest and spend time with their families after a long tax season.

How long will it be before I receive my refund?

If you file a complete and accurate paper tax return, your refund should be issued in about six to eight weeks from the date the IRS receives your return. We recommend mailing paper returns via USPS certified mail for tracking purposes. For returns filed electronically, your refund should be issued in approximately six weeks, possibly sooner if you choose to utilize direct deposit. Due to ongoing issues with the IRS from the prior year, we highly recommend our clients opt for direct deposit and file their returns electronically. Please make sure to include a voided check with your tax documents. You can check the status of your refund on the IRS website <https://sa.www4.irs.gov/irfof/lang/en/irfofgetstatus.jsp> . This link is also available on our website www.WrobelCPAs.com. Please do not call the office to check the status of your refund until the above recommended timeframe has passed and you have checked the status on the IRS website. We will reach out to you with any filing issues as soon as possible.

We truly appreciate your business and look forward to working with you.

Sincerely,

Wrobel & Associates, CPAs