



15514 Detroit Avenue • Lakewood, Ohio 44107 • p: 216-521-2100 • f: 216-521-3258
www.laskeycostello.com

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Dear Tax Client,

We hope this correspondence finds you healthy and well. We are ready for the 2023 tax season and would like to remind you on our firm's tax season process; we have summarized a few important topics and updates in this letter.

WHAT YOU NEED TO KNOW ABOUT THIS TAX SEASON

Please read this entire letter as our processes may have changed for 2023!

The tax filing deadline this year, without extension, is Tuesday, April 18, 2023. We strongly urge you to get us your information as soon as possible.

Enclosed is our tax organizer which will help you organize your tax information. The tax organizer is a guide that you can reference to remind you of information required to complete your tax return.

There are several ways to safely provide your tax documents to us. Information may be mailed to our office, personally dropped off, or e-mailed to our office manager, Emily Brambrick. Emily's email address is embrambrick@laskeycostello.com. If you plan to drop your documents off after business hours, they may be placed in the mailbox located outside the office's front door. If you choose to e-mail your information, please note your name in the subject line and take steps to ensure cyber security (i.e. password protecting documents, etc.).

In addition to the options above, we have an online portal by which you can submit and retrieve documents. If you are planning to submit your tax documents using our client portal, you must request this method by calling our office or emailing our office manager. Otherwise, we will not know that you uploaded forms or documents. After you contact us for a document request, a member of our staff will send you an email invitation to securely upload your documents to the portal.

In order to have your return completed by April 18th, please submit your tax information to us as soon as possible. We will do everything possible to turn around your tax filing in two to three weeks. The turn-around time may vary monthly. Tax returns are prepared in the order received regardless of complexity. If your information is received and we have not been able to process your return by April 18th, we will file you an extension.

IRS INFORMATION

Refunds may be smaller in 2023. Taxpayers will not receive an additional stimulus payment with a 2023 tax refund because there were no Economic Impact Payments (Stimulus Checks) in 2022.

The IRS cautions taxpayers not to rely on receiving a 2022 federal tax refund by a certain date. Some returns may require additional review and may take longer. The IRS continues to strengthen security reviews to protect against identity theft. Additionally, refunds to people claiming the Earned Income Tax Credit (EITC) or the Additional Child Tax Credit (ACTC) can't be issued before mid-February. This law helps ensure taxpayers receive the refund they're due by giving the IRS time to detect and prevent fraud.

APPOINTMENTS

If you have any detailed questions or would like to meet with us to discuss any new or unusual circumstances, please call the office to set up a meeting. Note that there are a limited number of appointments during this time frame, so please schedule early. We have multiple meeting options including in person, phone, or virtual (via Microsoft Teams).

FEES

Our fees for tax preparation are based on the complexity of the return and the time it takes to prepare/file it. We accept Visa, MasterCard, American Express, personal checks, and cash. Following industry standards, all credit card payments will be subject to a 3% fee. Credit card and electronic check payments can be made via our website as well. **All payments are due upon receiving your return, no exceptions.**

OTHER IMPORTANT NEWS

For your convenience, all client tax returns will be available through our secure client portal. This portal will allow you to log in to our website to gain access to tax returns and other confidential documents at any time. As in prior years, you will also receive a paper copy of your tax return.

If you have any questions, please let us know. A satisfied client is our most valuable asset. Your recommendation to an associate, friend or family member is more significant than any advertisement. We sincerely appreciate your patronage and as always, we strive to provide you with professional and efficient service.

We look forward to seeing you in 2023. If you have any questions regarding this letter or our services, please do not hesitate to call.

Sincerely,



Cynthia M. Costello
Certified Public Accountant



William R. Costello, JR
Certified Public Accountant