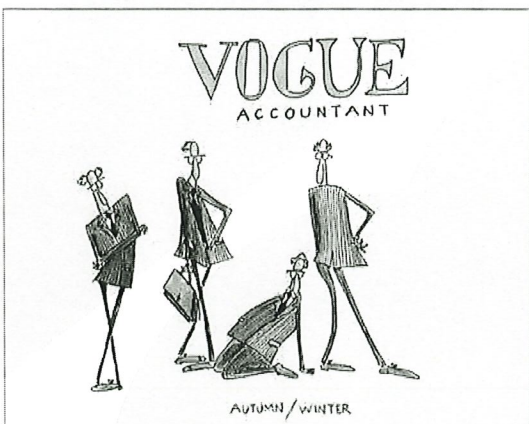


January 2023

The Internal Revenue Service Tax Code has changed many times over the decades. Accounting professionals have adapted too. We've kept up with the tax code and "fashion".



- 1980 – Price Waterhouse CPAs were required to wear white shirts with ties, no facial hair.
- 1990 – Women spent a lot of money on nylons at the Nordstrom's anniversary sale
- 2000 – Casual Fridays!
- 2010 – "Business Casual". No more neckties.
- 2020 – COVID. Zooming = business on the top, yoga pants on the bottom.
- 2022 – "Business Attire" is jeans without holes 😊.

When you have a majority of your 2022 information together; scan/upload, email, mail or drop it off. We have a mail slot, so you can drop off information 24 hours a day. Although we will try our best, extensions may be prepared for people who do not have their information in **before March 15th.**

- Fill out and return your organizer **at a minimum:**
  - Review your personal information
  - Fill out the questionnaire
  - Sign and date the last page of the organizer questionnaire as acceptance of our engagement terms
- Bring in the following documents:
  - All W-2's, 1099-R's reporting pension/IRA income, SSA-1099's reporting social security income
  - All 1099's reporting dividends, interest, miscellaneous income, stock and real estate sales
  - All 1098's for mortgage interest and real estate taxes you paid
  - Any K-1's for income from partnerships, S corporations, estates or trusts
  - Any real estate HUD closing statement for sales, purchases or refinancing
  - **A copy of your 2021 tax return, if not prepared by this office**

Thank you for partnering with us for your financial and tax needs. For those of you that are new to our firm, welcome. Here's to another year of hard work and some fun along the way.

Best Regards,  
*Nancy, Kathy, Becky, Chris & Charity*