



**~ Warm New Year's Greetings to You, our Clients and Friends,
with wishes for you for all that's good in the New Year ~**

We welcome your phone calls, emails, and written correspondence. Our Portal and Ramp Door Mail Slot are always open and secure. (Portal Users will need to navigate a new Log In)

We offer the following to facilitate your tax preparation....

- **2023 Personalized Tax Organizer** (Questionnaire + Worksheets)
 - ✓ PLEASE ANSWER ALL THE QUESTIONS ON THE **QUESTIONNAIRE** – Required of all clients
 - ✓ Returning Clients – Worksheet attachments reflect your 2022 tax information for reference (Need Worksheets? Please call our office or go to www.islandcpas.com)

- **Follow the Guidelines below to keep your Tax Preparation costs down:**

- ✓ Use your Organizer Worksheets for Data Entry
- ✓ Please do not enter the same piece of data in two places
- ✓ Enter TOTALS on Worksheets – **No receipts, please - file receipts at home in case of audit**
- ✓ Write information clearly and darkly - a BLUE or BLACK pen is BEST
- ✓ NO POST-IT NOTES, PLEASE - Please use white space for handwritten notes
- ✓ NO HIGHLIGHTER, PLEASE – It obscures the data when we scan your documents
- ✓ If you deliver your data in electronic form, we do not need paper copies of those documents

- **You will also need to provide the following Source Data:**

- **Forms W-2** for wages, salaries and tips.
- **All Forms 1099** for interest, dividends, retirement, miscellaneous income, unemployment compensation, nonemployee compensation, Social Security, state or local refunds, gambling winnings, payment card or third-party network transactions, etc.
- **Brokerage Statements** showing investment transactions for stocks, bonds, digital assets, etc.
- **Schedules K-1** showing income from partnerships, S corporations, estates and trusts.
- **Statements** supporting qualified educational expenses, deductions or distributions, including any **Forms 1098-T, 1098-E, or 1099-Q**.
- **Statements from U.S. Department of Education** supporting federal student loan forgiveness.
- **All Forms 1095-A, 1095-B, 1095-C, 1099-H** related to health care coverage or the Premium Tax Credit.
- **All Forms 1099-SA** and **Forms 5498-SA** for Health Savings Accounts.
- Statements supporting deductions for mortgage interest (**Forms 1098**) or taxes.
- Copies of **Closing Statements** regarding the sale or purchase of real property.

Vashon Island

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- **Legal Papers** for adoption, divorce, or separation involving custody of your dependent children.
- **Six-digit Identity Protection PIN** if sent to you by the IRS, for use filing your 2023 Tax Return.
- Any **Tax Notices** sent to you by the IRS or other taxing authority that we have not already received.

*And, finally, a word about **Carmelita Logerwell, CPA**....yes, she really has retired and is happily pulling her Airstream Bambi wherever there is sun and outdoor adventure!*

All of us listed below are preparing to step into those hard-to fill shoes in serving all her clients, who will be meeting their new CPA this Tax Season ~

*We welcome that challenge, but we need you to know that the Order of the Day will be that **The First to Come with Complete Data Packages, Will be the First to be Served!** Except for late-arriving Brokerage Statements and/or Schedule K-1s, please bring us your data all at one time so we don't have to set your file aside to wait.*

And, yes, there is no Getaway Weekend Drawing incentive this year ~ maybe next year when we have our sea legs under us once again!

**~ As always, your Tax Return Filed by April 15 will yield a cash contribution to the
Vashon Food Bank ~**

**Peter Lake, CPA Renee Butz, CPA Carly Christophersen, CPA
Karol Lake Dayna Jessen Lisa Huggenvik Michael Butz**