



NEWS REGARDING YOUR 2022 TAX ORGANIZER AND TAX PREPARATION

After a couple of years of trying to deliver tax organizers and related materials electronically, we are going back to paper delivery. You will receive the mailing shortly after January 1, 2023. We are returning to paper delivery because it was our experience that the technology was not sufficiently developed to provide you a 5 Star service experience. If you would like to receive your tax package in electronic form in addition to paper please contact Ms. Toni Coronado at (TCoronado@cpawin.com) or call Ms. Robin Cisler at 859-441-2020. We will set up a portal for you to enable secure file exchange.

We wanted to emphasize several policies that have been in effect for a number of years.

- 1) It is essential that you sign and return the engagement letter included in your organizer package.
- 2) It is essential that you complete the questionnaire included in your organizer package. The questionnaire asks important questions that may affect the proper and timely completion of your tax return.
- 3) If we do not have your complete tax information by March 17, 2023, it is likely your tax return will be extended, although we will advise you regarding extension payments and estimated tax payments that may be needed by April 18, 2023.
- 4) If you are waiting for one or two pieces of tax information please get us your tax information package so we can begin working on your return.
- 5) If you are not scheduled to meet with a member of our tax team to review your tax information and would like an appointment, please contact Deb Mueller (DMueller@cpawin.com) at 859-441-2020.

We look forward to working with you in 2023.

Anneken, Huey & Moser, PLLC