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Dear Client,

Preparing for 2023 income tax returns: *The 2024 Tax season is upon us and you should begin placing your documents in a folder and gathering your receipts. **Better preparation on your part will assist my proficiency.***

IMPORTANT

- Most of you will continue to send me your documents using the email in the heading. All tax returns will be completed remotely and will be either mailed by USPS, email, or picked up in Montvale.
- Those clients, who are sending me their documents via e-mail, please use jpapaxle26@outlook.com as this account is only used for *Papa Tax Accounting*. Also upon the completion of your returns you will receive a **pdf password** protected copy. **Your password will be a nine (9) digit number which will be composed of the last 4 digits of your SS# and your 5 digit zip code.**
- **RMD's:** *Required Minimum Distributions from your IRA, 403b, 401k, and other tax deferred/sheltered investments must be taken by December 31st if you were 70 years old on July 19, 2019 or after and you reached your 72nd birthday in 2022.*
- **APPOINTMENTS & SCHEDULING.....***For those who scan W-2's, 1099's, and other pertinent documents and send me your data electronically I will be able to prepare your taxes as early as **February 1, 2024** from my location in Florida.*
[Use jpapaxle26@outlook.com]
- **ALL NY STATE RETURNS: YOU MUST SUBMIT BOTH SIDES OF YOUR DRIVER'S LICENSE**
- **Scanning to a PDF format is requested as images and photos from phones are not clear and cut off pertinent information.**
- If you are sending me your documents by USPS you may send directly to my Florida address no later than February 28th. If you are mailing after that date please wait to mail to Montvale address after March 15th. For those clients who will be dropping off or scheduling an appointment, I will not be available until sometime after March 15th. *For additional information visit www.papatax.com.*

Necessary Documents: *(Most documents should be received by February 1, 2024):*

*Sincerely yours,
John Papa*