**REB CPA, PLLC**
**1630 E Bethany Home Rd**
**Phoenix, AZ 85016**
**602-730-7020**

# Tax Reporting Season Letter

Dear Client:

This Organizer Package is designed to help guide you in gathering the tax documents and information needed to prepare the 2023 tax reporting.

**Required Information**

The following documents and information must be received by our office before we begin the tax reporting process:

1. Signed Engagement Letter/Price Agreement (ELPA)
2. Completed Tax Reporting Checklist (with explanations and completed REB Worksheets)
3. Completed and marked up Organizer (if you do not provide a completed and marked up Organizer to us, you must provide the information requested in the Organizer Package in an organized and legible format)
4. Copies of tax documents

To ensure we are able to transmit the tax reporting to tax authorities by the Regular Due Date of April 15, 2024, we must receive the **"Required Information" by Wednesday, February 28, 2024.** If the **"Required Information"** is not provided by this date, we will assist you with preparing and transmitting a request for extension of time to file, and the tax reporting will be prepared after April 30, 2024. To ensure we are able to transmit the tax reporting to the tax authorities by the Extended Due Date of October 15, 2024, we must receive the **"Required Information" by Friday, August 30, 2024.** If we do not receive the **"Required Information"** by this date a surcharge will be added to the price of your tax reporting, and the tax reporting will be prepared after the extended due date.

**Organizer Package**

Complete the Tax Reporting Checklist, and provide explanations and additional information for ALL "Yes" answers. Complete all REB Worksheets the Tax Reporting Checklist prompts you to complete. The REB Worksheets are conveniently located on our web site at www.rebingamancpa.com/forms-individual .

The individual organizer document makes reference to tax documents and information applicable to your prior year tax reporting. When completing and marking up the Organizer document, please indicate if any items listed in the Organizer no longer pertain to you.

**Information Requests**

During the tax reporting engagement there will instances where we will need to request additional documents and information from you. These requests will be delivered to your Client Portal and show in your Client Portal home screen as "To-Do" items. The Client Portal system will send you email alerts when requested items are added to your Client Portal. Please login to your Client Portal to respond to these requests in a timely manner so we may continue to progress through the tax reporting process. Delays in your responses will extend the turn around time needed to complete the tax reporting. If there is a challenge with accessing your secure Client Portal to respond to these requests, the information requests will be delivered to you via regular email.

If you have any questions, please contact us.

Thank you for the opportunity to be your trusted advisor!

Sincerely,

*REB CPA, PLLC*