



## 2023 Year End Client Letter

### General Information/Appointments

The last three years (2020-2022) have seen an unprecedented increase in tax law changes and compliance at both the Federal and State level. This increase in compliance comes with increased time to prepare individual returns as we adjust processes and software. Our reporting requirements have not lessened this year.

Recognizing the impact these changes have, Anita and Chris have worked throughout the year to keep you informed, answer questions, tax plan, and provide projections. **In order to be as efficient and timely as possible, during TAX SEASON, if your situation has not changed, or you have met previously with Anita or Chris, we are asking that you schedule a planning and review appointment after APRIL 17<sup>th</sup> instead of a Tax Preparation appointment.** Our goal is to give everyone quality time without rushing. We greatly appreciate it.

### **Important Dates to Remember**

#### **March 15, 2024**

COMPLETE personal tax information needs to be IN OUR OFFICE to guarantee an April 15<sup>th</sup> deadline.

#### **March 15, 2024**

Please provide any foreign bank account information.

#### **April 1-15, 2024**

Accountants will ONLY be taking appointments for extension estimates and tax return deliveries.

**Checklist needs to be filled out completely; if something does not apply please mark N/A. If you do have changes, please mark that on the checklist!**

**\*\*\* Do you use Venmo, CashApp, or do you work for DoorDash, Uber, or Grubhub? \*\*\***

Sincerely,

Anita Meis and Chris Buhler

Odstrcil & Meis, CPAs, PC

**Please visit our website for more information**

**[www.meiscpas.com](http://www.meiscpas.com)**



**\*\*\* Please be sure to answer the questions and return with your tax documents \*\*\***

### Required Client Verifications and Personal Information

#### Virtual Currency Verification

At any time during 2023, did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?

Yes  No

#### Foreign Accounts

At any time during 2023, did you have a financial interest in or signature authority over a foreign financial account (such as a bank account, securities account, or brokerage account) or foreign trust?

Yes  No

#### Updated Personal Information

**No Change**

Direct Deposit/ACH withdrawal (optional)

Bank Name \_\_\_\_\_

Routing # \_\_\_\_\_

Account # \_\_\_\_\_

Personal Information

Address \_\_\_\_\_

Email(s) \_\_\_\_\_

#### **NEW CLIENT - ONLY**

Social Security Number(Taxpayer) \_\_\_\_\_

Social Security Number(Spouse) \_\_\_\_\_

Date of Birth(Taxpayer) \_\_\_\_\_

Date of Birth(Spouse) \_\_\_\_\_

#### **New Dependents - ONLY**

Dependent Name(s) \_\_\_\_\_

Social Security Number(s) \_\_\_\_\_

Date of Birth(s) \_\_\_\_\_

\_\_\_\_\_  
Taxpayer Signature Date

\_\_\_\_\_  
Spouse Signature Date

\_\_\_\_\_  
Taxpayer Printed Name

\_\_\_\_\_  
Spouse Printed Name

**Please sign and return the engagement letter below with your documents you send in for preparing your tax return:**

Thank you for trusting Odstrcil & Meis, CPAs, PC to assist you with tax matters this year. This letter confirms the terms of our engagement with you and the nature and extent of our services.

We will prepare your 2023 Federal and Colorado tax returns and other states as requested using information you provide to us. We may ask for clarification of some items, but we will not audit or otherwise verify the data you submit.

It is your responsibility to provide information required for preparation of complete and accurate returns. You should keep all documents and other data used to support your reported income and deductions. They may be necessary to prove accuracy and completeness of the returns to a taxing authority. You are responsible for the returns, so you should review them carefully before you sign them.

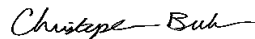
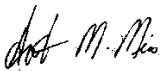
Your returns may be selected for audit by a taxing authority. Any proposed adjustments are subject to appeal. In the event of such examination, we can arrange to be available to represent you as part of a separate engagement. Fees and expenses for defending the returns will be invoiced in accordance with terms we agree on for that engagement.

Our fee for preparation of your tax returns will be based on a combination of factors including the type of return, the number of forms required, and the amount of time required. Historical billing rates are also taken into consideration. Due to increased costs and new compliance measures, we expect our fees to increase 5% approximately. **We will be charging corresponding fees (3%) on all payments made by credit card** to cover the additional cost of credit card processing.

We will retain copies of records you supplied to us along with our work papers for your engagement for a period of seven years. After seven years, our work papers and engagement files will be destroyed. All of your original records will be returned to you at the end of this engagement.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign the enclosed copy of this letter in the space indicated and return it to us. We appreciate your confidence in us. Please call if you have questions, 970-352-0661.

Sincerely,



Anita Meis

Chris Buhler

Odstrcil & Meis, CPAs, PC

Accepted By: \_\_\_\_\_

Printed Name(s)

\_\_\_\_\_  
Taxpayer Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse (If Applicable) Signature

\_\_\_\_\_  
Date