



IMPORTANT DATES AND INFORMATION FOR TAX SEASON

Thank you for choosing Megan D. Muccio, CPA, PLLC for your tax preparation services. I look forward to working with you this year. I am very excited for this year's tax season and am already preparing for appointments throughout February and March for clients. **In preparation of this year's tax season, I wanted to send you some information and requests ahead of time.**

THE TEAM:

We're growing! I'm happy to announce the addition of Samantha Kruk and Tarah Simon to my team.

Samantha will be joining our team as Tax Preparation Assistant. She will be primarily responsible for reviewing the documents sent in and reaching out with questions on missing items. She will be reachable at Samantha@MuccioCPA.com.

Samantha has been working in the accounting field for over 6 years and has performed and enjoys every aspect of it. She is looking forward to working with everyone in this new endeavor and upcoming tax season.

Tarah will be joining our team as the Administrative Coordinator. She will be responsible for setting appointments, client support, tax meeting assistance, and overall office efficiencies. She will be reachable at Tarah@MuccioCPA.com, in addition to on our office line (631) 393-2888.

Tarah has over 12 years of administrative experience in various fields, always striving to ensure a smooth and pleasant experience for the people she works with. She is passionate for community service and building customer relationships. She is so excited to start working with everyone this tax season.

I know that you will love working with them as much as you do with me. Please be on the look-out for emails and phone calls from Samantha and Tarah, as well as myself, while your return is being processed.

As always, I will be your primary point of contact, and with the added support this year, I can focus my full attention on continuing to ensure your taxes are completed accurately and timely, and that we have another successful tax season together.

APPOINTMENTS:

To ensure everyone is comfortable in the tax preparation process, I will again be offering multiple methods by which to prepare and finalize your return, whether through virtual or in-person meetings, or simply by phone and email if you choose not to schedule a formal meeting. Please give our office a call or email us to get set up for this year.

Weekend and night appointments are available if desired. Please schedule early to ensure time is available when you need.

SMARTVAULT:

I am excited to continue using SmartVault this year, a secure and organized way to not only complete this year's taxes, but also to maintain and store your tax files for years to come.

As you begin receiving your tax documents in the upcoming weeks, please make use of SmartVault and upload the documents into the TY22 folder.

Inside your SmartVault portal, click into "View Files and Folders" > "Public Documents" folder:

- Sign and date the **Engagement Letter**
- Complete the **Tax Data Sheet**
- If you are a client of Craig James Financial Services, sign and date the **Sharing of Information Letter**

Upload all completed documents back into the portal with your tax forms by clicking into "File Exchange" and selecting "Upload file" for the TY22 location (indicated on the right).

If you are new to SmartVault, please let us know so we can send you an email activation link, as well as instructions for use. **For a video overview** of the portal, please click the link [here](#), and as always, you can email or give the office a call for help.

TIMELY SUBMISSION OF DOCUMENTS:

Please aim to provide documents a minimum of **2 weeks prior** to any scheduled appointment. This will allow us to prepare a draft of your return and send a follow-up email with missing documents. **If you are not meeting with us**, please provide your documents at your earliest opportunity so that we can ensure timely preparation of your tax return.

Understandably, some items / documentation may be missing initially. We encourage you to upload or send in the documents that you have so we may begin preparing your return. You may upload missing documents as soon as you receive them. Please provide us with the following supporting documentation:

- All tax documents, as detailed on page 3 of your tax data sheet
- Responses to and support of all questions on the tax data sheet
- Any notices received from the IRS or other taxing authorities

Please remember if you are waiting for K-1s, you can still make your appointment or send in your information early. Your return can be prepared while we wait for pending information. This allows us to complete your return in the shortest amount of time.

If you have **foreign bank accounts**, you must inform us if you hold any type of foreign assets, including bank or securities accounts. There are severe penalties for failure to report these accounts on your tax return. Please Note: The **FBAR or FinCEN Form 114 is due on April 15, 2023**.

TAX PREPARATION COMPLETION:

Upon completion, please **take the time to review your tax return**. If you are satisfied, the following is required:

- You, and your spouse if applicable, are responsible for signing the E-File Authorization form
- **For your refund and / or balance due**, communicate if you would like to receive a check / pay by check or set up an automatic deposit into / withdrawal from your account on a date of your choosing

**As a reminder, SmartVault provides you with access to all documents and tax returns organized by tax year. This can be found in your “View Files and Folders” > Personal Folder. Click into any tax year to review documents associated with that year.

BEFORE E-FILING:

Our office requires the following items to be in our possession before we can file your return:

- **Signed Engagement Letter**
- **Signed E-File Authorization Forms** (Federal and all required states)
- **Our fees for tax preparation services** (Payments are to be made by check payable to Megan D. Muccio, CPA, PLLC, Zelle or via Debit or Credit Card)

OUR ELECTRONIC FILING DEADLINE:

Please note that we are required by the government to electronically file your tax returns. The IRS deadline for 2023 is April 18th, however our **internal deadline for filing is Friday, April 14, 2023**. We need to assure that your returns have cleared and are accepted by the appropriate government agencies.

I sincerely thank you for your business and look forward to hearing from you soon. Wishing you and your family health, happiness, and peace in 2023.

A handwritten signature in black ink that reads "Megan D. Muccio". The signature is written in a cursive, flowing style.

Megan D. Muccio, CPA
Certified Financial Fiduciary®
Certified Wealth Strategist®