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January 2024

We hope that you and your family have remained safe and healthy throughout the holiday season. As in years past, we will be offering individual appointments on select days, while highly encouraging our drop off services.

For **ALL** clients, please complete the enclosed worksheet and bring it with you for this year's filing. Please **do not mail** this worksheet to us! **The worksheet included is for returning clients** (a new client version can be found on our website if you will be referring anyone). Filling this out is **required** and helps us streamline the preparation process.

A few final reminders: Please include your Driver's License or state issued ID information on the worksheet. This is a requirement for electronic filing and we are **NOT** able to do so without this information. As always, **payment must be received prior to electronically filing your return.** Lastly, there will be a \$10 postal charge for anyone who wishes to have their return mailed to them upon completion.

Please call us with questions and check out our Facebook page or website for more information and details! We look forward to seeing you in the coming months!

~Bill & Kim

IMPORTANT "Drop Off" Service Information

No appointment is necessary for drop off services! Your options include:

1. Drop off in person at the office (or in our outside locked box if after hours)
2. Mail to our PO Box, we will call to confirm when we receive it
3. Upload digitally onto Sharefile (please contact us for the set-up of this option)

These services will begin on Monday, January 22, 2024.

- **Our turn-around time is 5 weeks;** however, please note that this could fluctuate based on factors we do not have control over
- You must have your tax information to us by **MARCH 9TH to GUARANTEE that your taxes will be done for April 15th**
- If you think you may owe and know or think you may need an extension, **YOU** must tell us you want to make a **PAYMENT WITH THE EXTENSION**

Russellton Office Hours beginning **January 22, 2024 through Tax Season:**

Monday – Friday: 9am – 7pm

Saturday: 9am – 3pm

Appointments will be offered **Mondays, Tuesdays, Thursdays, and Saturdays** with varying time slots between Bill and Kim.

We are now scheduling appointments beginning Monday, January 29, 2024 through Tuesday, April 9, 2024.

Digital Returns

- You are now able to decide the format of your personal, take-home return! Choose between a PDF flash drive, Citrix Share File upload, or a hard, paper copy. **Please indicate this preference on the taxpayer worksheet! If a preference is not chosen, we will prepare the return as a paper copy.**
- If you chose the flash drive option last year, make sure to bring it back, as we can re-use it for this year's return and you will receive a discount!

Winterville & Mt. Pleasant Offices:

- Tax preparation at these offices will be by drop off only
- Specific location hours can be found on Facebook or our website

Continued COVID Protocol

- **If you are sick by any means, please do not come into the office!** If need be, we can mail your return to you or reschedule appointments