



**BELT ACCOUNTING**  
AND TAX

## 2023 Tax Preparation Information Letter

Dear Client:

We are looking forward to working with you again this year! The enclosed Client Information Sheet is designed to help you gather the tax information needed to prepare your 2023 personal income tax return. **\*\*These questions provide us with important tax items necessary for us to prepare your return quickly, efficiently, and most importantly accurately. Therefore, it is imperative that all sections are completed.\*\***

On the back side of this letter, please find our 2023 Individual Tax Return Engagement Letter. This **must** be signed and returned with your tax information for us to begin work on your tax return.

You will also find a helpful checklist on page 7 of the Client Information Sheet that will assist you in gathering all the necessary tax documents for us to complete your tax return.

You have the following options for getting all documents (**MUST be in PDF format**) to us:

**\*\*Please to DO NOT highlight any information on any documents submitted\*\***

1. Belt Accounting portal – upload **PDF (NO JPEGs/photos)** documents directly to our secure portal (email [abbeygrossman@belt-accounting.com](mailto:abbeygrossman@belt-accounting.com) to request this option).
2. Drop off at our office during normal business hours (February 5 – April 11) :

	<b>PEWAUKEE, WI</b> 2417 Silvernail Rd Pewaukee, WI 53072	<b>GEORGETOWN, TX</b> 601 Quail Valley Dr, #111 Georgetown, TX 78626	<b>KILLEEN, TX</b> 2109 S Clear Creek Rd Killeen, TX 76541	<b>SALADO, TX</b> 3366 FM 2484 Salado, TX 76571
Mon-Thu	9:00 am – 6:00 pm	M/W 9:00 am – 5:00 pm T/R By appt only Other times by appt	9:00 am – 1:00 pm Other times by appt	Call 254-526-7700 x3 to arrange drop off only
Fri	9:00 am – 4:00 pm	By appt only	By appt only	Call 254-526-7700 x3 to arrange drop off only
Sat	9:00 am – 12:00 pm	By appt only	By appt only	Call 254-526-7700 x3 to arrange drop off only

3. Drop off **with** a scheduled appointment to meet with a CPA. Appointments can be scheduled by calling our office at (262) 646-4323 or (254) 526-7700 and selecting 0, or online at [www.belt-accounting.com](http://www.belt-accounting.com).
4. Mail to our PEWAUKEE or GEORGETOWN (addresses above) office. If selecting this option, it is strongly recommended that you mail with tracking (Fedex, UPS, etc.) to ensure documents are not lost or compromised.

**IMPORTANT:** While the Federal filing deadline for tax year 2022 will be April 16<sup>th</sup>, **BELT ACCOUNTING** will be strictly adhering to an earlier deadline of 4/11/2024 at 5:00 pm, **no exceptions**, to ensure there are no system delays or bottlenecks with the IRS in processing. Additionally, our office **will be closed on Monday April 15<sup>th</sup>**, to give our staff a mental health break following the end of another tax season. To assist us in meeting the filing deadline for your 2023 income tax return, **ALL your tax documents (including a signed engagement letter and a completed Client Information Sheet) must be received by us no later than Friday March 22nd.** We recommend that you do not wait until the last few days. If we receive a large volume of returns close to the deadline, we may not be able to guarantee timely completion. They will be prepared in the order in which we have received ALL COMPLETED information..

If we receive your data after 3/22/2024, we will make every effort to meet the filing deadline, but we will **require a minimum \$50 fee up front** to file an extension on your behalf. Additionally, you are responsible for ensuring that any balances due to the federal and/or state(s) are made on or before April 16, 2024. The extension ONLY provides additional time to file the return, not additional time to pay your taxes. If you believe that you will have a balance due to the IRS and/or state(s), and require assistance with calculations, hourly rates will apply.

You will receive notification via e-mail when your tax return is complete. **Please ensure that you are checking your email regularly, including your spam folders.** Your completed 2023 income tax returns will be **submitted for electronic filing** to the federal and state(s) governments **two (2) business days following receipt of payment** of your 2023 tax preparation fee **AND signed Form 8879.**

Thank you for the opportunity to serve you.

Sincerely,  
**Belt Accounting & Tax, LLC**

2023 INDIVIDUAL TAX RETURN ENGAGEMENT LETTER

Dear Client:

This letter confirms the terms of our engagement with you and the nature and extent of the services we will provide.

We will prepare your 2023 federal and all state income tax returns using the 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. The completed Client Information Sheet is designed to assist you with gathering all the information required to complete your return, along with providing us with necessary data to ensure accuracy. Therefore, it is essential that this Client Information Sheet be completed in its entirety and signed prior to preparation of your tax return.

It is your responsibility to provide the information required for preparation of complete and accurate returns. You should keep all documents, canceled checks and other data that 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.

Our fees for this work will be based on the complexity of your tax return, the amount of time required to complete the return, including time spent following up on incomplete or missing information and documents, plus any out-of-pocket expenses. If you require an estimate, we will give you a non-binding estimate based upon your representations about the complexity of your returns. All tax return invoices are due and payable upon presentation to you and prior to us submitting the tax return(s) on your behalf.

Our fees include the following:

- 1040 Federal and State returns with schedules.
- Estimated tax payments calculation.
- Document review, organizing and scanning
- Client phone calls and emails to answer basic tax questions. Additional fees may apply for calls and emails that require research or are related to tax planning.
- Tax questions and tax information – no charge for general tax information. Exception will be for advanced research.
- ONE copy (electronic) of your tax return. If additional copies are requested, additional fees will apply.

Your returns may be selected for review by the taxing authorities. Any proposed adjustments by the examining agent are subject to certain rights of appeal. If the government selects your returns for review, we can arrange to represent you. Such representation will be a separate engagement for which an engagement letter will be provided to you. Fees and expenses for defending the returns will be invoiced in accordance with the terms we agree on for that engagement.

In the unlikely event of a calculation error in the preparation of your tax return, we will reimburse you for any penalty for which we made you liable, provided the information that you supplied us was correct.

We are committed to the safeguarding of your confidential information, and we maintain physical and electronic safeguards to protect your information within our office. Unless required by law, we will not disclose any information about you unless we have your written approval as required under Reg. §301.7216-3(a)(1), even if you are no longer a client.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign this letter in the space indicated below and we will retain a copy in your client file.

I have read and understand the 2023 Tax Preparation Information Letter

Again, we want to express our appreciation for the opportunity to work with you, and hope that you will bring any questions or concerns to our attention.

Sincerely,  
Belt Accounting & Tax, LLC

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

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Date

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

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Date