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ANNUAL LETTER

January 8th, 2024

Dear Client:

We hope you have a wonderful and healthy start to the New Year! We are excited to announce that this year marks our 38th year preparing taxes. We are looking forward to servicing your tax needs.

All your tax documents needed to file your 2023 tax return will be arriving by the end of this month.



TAX UPDATES:

- 1) The child tax credit has remained the same as 2022 which is 2,000 for all children up to 17 years old.
- 2) The basic standard deduction amounts for 2023 have been increased.
- 3) Changes in earned income credit threshold.
- 4) The limit on elective deferrals for 401(k) plans is \$22,500 with a catch-up contribution of \$7,500 for individuals age 50 and over.
- 5) The contribution limits for traditional and Roth IRA's is \$6,500 with a catch-up contribution of \$1,000 for individuals age 50 and over.

There are other changes including the above listed items. This will be discussed pertaining to your individual needs during our interview.

Please note that we prepare returns for all 50 states. We also have an international tax consultant and an IRS enrolled agent on our staff to assist you.

HOW TO UPLOAD YOUR DOCUMENTS

Our website www.mentincpa.com has a summary of our services and experience. A very helpful checklist can be downloaded that will help you organize specific items needed in preparation of your tax return. Please send this completed checklist along with your documents.

You can upload your documents on our secure portal at mentincpa.com. Please include your phone number and e mail so we can contact you. **All your documents should be sent together at the same time.** Sending photos of your documents is not advised because the print is often illegible.

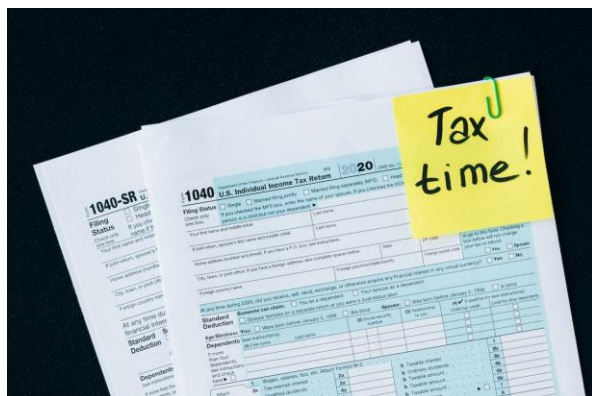
Our tax preparer will acknowledge receipt of your documents within 24 hours.

IF YOU ARE NOT ABLE TO SCAN YOUR DOCUMENTS THEN PLEASE MAIL YOUR DOCUMENTS TO 75 WEST END AVENUE APT R29C NEW YORK, NY 10023. PLEASE USE EITHER PRIORITY MAIL OR FEDEX OR REGULAR MAIL. DO NOT USE CERTIFIED RETURN RECEIPT. PLEASE SEND COPIES AND NOT ORIGINALS.

IN PERSON APPOINTMENTS WILL ONLY BE HELD DUE TO CERTAIN EXCEPTIONS LIKE EXCESSIVE DOCUMENTATION, COMPLEXITIES WITHIN THE RETURN, AND INABILITY TO SCAN OR MAIL DOCUMENTS. ALL APPOINTMENTS WILL BE HELD BY ZOOM OR PHONE CALL.

PLEASE PROVIDE YOUR DOCUMENTS ELECTRONICALLY AT LEAST A WEEK PRIOR TO YOUR ZOOM OR PHONE APPOINTMENT IN ORDER TO EXPEDITE YOUR RETURN.

PROCESSING OF RETURN AND PAYMENT:



Once you review the final product, you can first sign and then scan or fax the electronic filing authorization forms back to us. We must have the signed forms and payment for our services in order to file your tax return. Our review department will not file the returns without authorization and payment.

SCHEDULING AN APPOINTMENT

This e mail is a mass e mail sent to all our clients. Please **do not respond to this e mail**. A separate e mail to book an appointment should be sent to **Irene Entin at (917) 697-6181** or our answering service at **212-561-7398**; or e-mail us at **ientin62@gmail.com**. Irene or another staff member will contact you. Please use **only one e mail address for appointments ientin62@gmail.com**. Please do not send a text to request an appointment. If you need to cancel an appointment, please notify us at least 24 hours in advance and we will re-schedule.

EXTENSIONS

If we do not receive your documents by March 31st, 2024, we will need to file an extension. In order to do this, we need to review your documentation and we will advise you if you need to pay in to avoid penalties. Anything sent after March 31st we will not be able to review due to approaching deadlines and time constraints. If you need pay the required amount by April 15th

2024 you will be subject to significant penalties. Even if we file the extension, failure to pay penalties and interest can be quite significant as the interest rate has increased. **Lastly please try to save the pdf copies of your returns that we send you to avoid future administrative fees.**

ADDITIONAL QUESTIONS AND CORRESPONDENCE

For other questions and correspondence issues, please call (212)561-7398,

or e mail us at mdeconsultantsinc@gmail.com.

- **PAYMENT**

Our preferred payment method is through zelle with the recipient mdeconsultantsinc@gmail.com. We will also continue accepting payments via our website at www.mentincpa.com. Just go to the payment section and either pay directly by credit card, paypal or venmo. Payment by cash or check will of course remain an option. **We must receive your payment by no later than the submission of the e-file authorization forms. If you are mailing your check please mail it to 75 West End Avenue Apt R29C, New York, NY 10023.**

FOR QUICK REFERENCE OUR FAX NUMBER IS 917-793-4541.

We are grateful for the opportunity to serve you as your tax preparation provider. Your business is greatly appreciated, and we welcome any new referrals.

Thank you for choosing us to assist with your tax return. We hope to continue serving you in the future and are excited to be a part of your financial planning.

Sincerely,
Mark D. Entin, CPA