

Dear Client,

As the new year begins, it's time to start thinking about income taxes again. While 2023 has been another challenging year, we hope that last year was also a good and prosperous year for you.

PLEASE read this entire letter carefully and comply with these instructions. This will expedite the delivery and processing of your tax return. Important information is included below, special emphasis is noted with **CAPS and BOLD**.

You should have received a sharefile request link from us to both download your 2023 tax organizer and upload your all your 2023 tax documents securely and safely. Please accept this invitation and set up your account **UNLESS YOU HAVE ALREADY DONE THIS IN 2022**.

This will be the last year we will use this e-mail format to send the organizer to you. We will continue to use e-mail to request information from you, which you can then provide the request documents to the secure website.

Attached is your 2023 Tax Organizer for your tax return preparation. The organizer summarizes your 2022 tax information and provides space for you to enter your 2023 data. **BLUE OR BLACK PEN** must be used to complete your organizer; do **not** use pencil as the lead fades or is very hard to read.

PAPER CLIPS are preferred should you need to attach items to your organizer. Staples slow down the entire process as they must be removed and tear documents. Also, remember, **no original documents** as we only need **COPIES, PLEASE**.

VERY IMPORTANTLY, we **REQUIRE** completion of the following organizer pages:

- **BASIC TAXPAYER INFORMATION**
- **GENERAL QUESTIONS**
- **BUSINESS/INVESTMENT QUESTIONS**

IRS REQUIRED information is included on these pages that we **MUST** have to **COMPLETE** your income tax returns.

As you receive your 2023 tax documents, such as your W-2s, Form 1099s, K-1s, brokerage statements, etc., please collect them and keep them with this organizer. Your check register may also include pertinent information. Included in your organizer is a personalized list of necessary tax documents based on last year's tax return. Be sure to include any new tax forms you receive this year with your completed organizer.

Complete only those schedules that apply to you. If you have already prepared other schedules for the necessary information, refer to them in the organizer and enclose them for our use. **A fully completed organizer lessens the likelihood of omissions from your tax return.**

Upload your completed organizer to our sharefile system. If unable to do this, you may also send your organizer via e-mail to jewettinc@jewettinonline.com or fax TOLL FREE to 1-888-513-4386.

As a last resort due to continuing cost increases and delays you can send via US Post Office PRIORITY MAIL ONLY (**least preferred method**) which now includes delivery confirmation (NO signature or delivery receipt requests PLEASE as this slows down the delivery) to:

**JEWETT, INC.
5036 DR. PHILLIPS BLVD.
#302
ORLANDO, FL 32819**

Thank you in advance for your cooperation regarding these matters.

This year, we will be e-filing ALL personal tax returns unless we are prohibited for some reason. In addition, unless you opt out, you will be authorizing on your return Jewett, Inc. to be contacted as a third party to aid in any inquiries the IRS or State taxing authority may have regarding the filing or information contained in your tax return(s).

You may also contact our office to set up an appointment to complete your 2023 tax return(s) if there is a resolution to the current RSV and Flu viruses. **Otherwise, we will not be conducting in person appointments this tax year due to safety concerns.**

We look forward to hearing from you soon. Personalized customer service is our priority. As always, contact us if you have any questions. Thank you in advance for your business and the trust you have placed in us.

Sincerely,



Bruce H. Jewett
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