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Dear Clients and Friends:

Happy New Year! I hope the New Year 2023 finds you all in good health and that you have all had a wonderful Holiday Season.

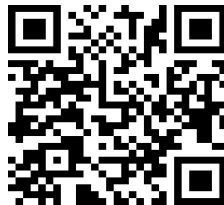
Tax Season is here once more. A Checklist is included with this letter that will help in gathering pertinent documents to prepare your 2022 Income Tax Return. A **Personal Information Data** sheet included for you to update your information, please fill this in and return with your tax paperwork.

You can also contact me for a personal tax organizer with all of your 2021 tax information.

Please call at your earliest convenience to set your appointment @ 925.759.8339 or message me using the convenient QR Code below.

- **Health Insurance:** If you were insured through the Healthcare Marketplace, you will receive a **1095-A**. Private or employers a **1095-B** or **1095-C**. California penalizes those that do not have health insurance.
- **Use tax (sales taxes) on purchases (this applies only to California clients).**
- **Foreign bank account** –Financial interest in or signature authority over a financial account or asset located in a foreign country.
- **Crypto currency purchased or traded AND foreign bank accounts.**

Please answer with a **Yes (Y)** or **No (N)** to the four questions on the bottom of the **Personal Information Data** sheet. These are required to complete your return.



There are several ways to get your document to my office.

In-person, sit down, appointments are available, and I continue to encourage **you to drop off your documents (as usual or at the office below)**

**SecureFilePro Portal** –Returning clients and **new** clients can upload pdf documents and send messages as a **Guest**. No account is needed to upload or receive documents from my office.

Below are the dates you should receive tax documents from your employer or financial institution.

- For tax year 2022 ALL W-2's and 1099-NEC's **MUST** be filed with the government and sent to the employees and subcontractors by **January 31, 2023**.
- Brokerage statements 1099's for Interest, Dividend and Capital gains by **February 15, 2023**.
- K-1's will be issued by **March 15, 2023**.
- ~~All payment through Venmo, PayPal, Amazon and the like, starting in 2023-->>>~~ IRS has **delayed** this rollout until next year, however, you may still receive a **1099K**.

It is my sincere hope that you will continue to put your trust in allowing me to handle your tax preparation needs. This tax season I will be maintaining office hours at:

**6163 Bethel Island Rd Bethel Island CA 94511**

**Check my website for hours and more information**

Please pass a copy of this letter along to your family or friends, as I will be happy to assist them in the preparation of their tax returns. (Use the QR code to message me)

Best wishes to you all for a healthy, successful and Happy New Year in 2023! Go to [www.lairdtax.net](http://www.lairdtax.net) for more information, current tax updates, forms, and reminders.

**Paul Laird EA**