

Welcome to Tax Season 2024!

Happy New Year!

I hope the last few months have been treating you and your loved ones well. While the 2023 tax season seemed never ending, I expect 2024 should be a more typical compressed filing season. I look forward to working with you again this year, and hopefully we can navigate any new challenges smoothly.

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Client Portal — To get things started, please log into your [client portal account](#) to review and sign the engagement letter. You'll then receive the 2023 "Essential Organizer" questionnaire, containing questions I need to ask and document every year. Once you finish uploading all the tax information documents you're expecting to receive, please check the "Done Uploading" button. That prompts me to start work on your return.

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Appointments — For those needing appointments to drop off documents at the office or to schedule a video or telephone meeting, requests are now available through my [online scheduler](#).

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2023 Tax Return Due Dates — Individual tax returns are due on Monday April 15, 2024. To meet that April 15 deadline, I need to receive your substantially complete information by March 25. If I don't have your documents by then, we will need to extend your return.

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2023 Tax Returns on Extension — Extensions provide extra time to file, although any tax balance due is late if paid after April 15. For individual returns on extension, the filing deadline is October 15, 2024. To meet that deadline, I need your complete information no later than September 24. .

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Clean Energy Vehicle credit — Starting in 2023, taxpayers have three separate tax credits available for the purchase of clean vehicles: a credit for new vehicles, a credit for previously-owned vehicles, and a credit for business vehicles. Each credit contains many rules and limitations, and starting in 2024, some of these credits can be claimed at the dealership at the time of purchase. I have more information on my website [here](#).

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Roth IRA direct contribution limits — I had an unusual number of clients last year that made direct contributions to a Roth IRA and then had to back them out because their income was too high. For reference, the 2023 Roth IRA limits are

published [here](#). If you have questions about your eligibility, please contact me before making your contribution.

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Business Use of Your Car — Remember when claiming business mileage, we need to report the total mileage you put on your car over the entire year. Please go out and check your odometer reading right now so we can calculate your annual mileage!

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Tax Organizer PDF Files — I can manually generate a personalized tax organizer (PDF file) for you if you find it helpful. Clients with rental properties or self-employment typically find these organizers most useful as they provide worksheets based on the prior year's information. Please send me a brief note if you'd like me to generate this file for you.

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New clients — I can only begin working with new clients in the summer. Please direct any friends you would like to refer to me to this [new client consultation link](#).

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As always for the last 24 years now, please let me know if you have questions as we move through the process. I look forward to catching up and working with you again this year. I very much appreciate your continued business and support!

Russ Emmons