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Accounting, Real Estate and Tax Services

OK, here we go! Welcome to tax season 2024.

1) I am sorry, I CANNOT take any new clients EXCEPT for your sons and daughters filing their first returns. Still have too many....even after not adding anyone new last season....

2) Once you have your tax documents 100% ready, send them to me right away. Please do NOT wait! I will start preparing 2022 tax returns on January 15th, 2024. BUT ....

3) ... Dividends and Stock Sales (and the like) are often not reported until mid-February. Do not file your return before you get these documents if they apply to you. AND ...

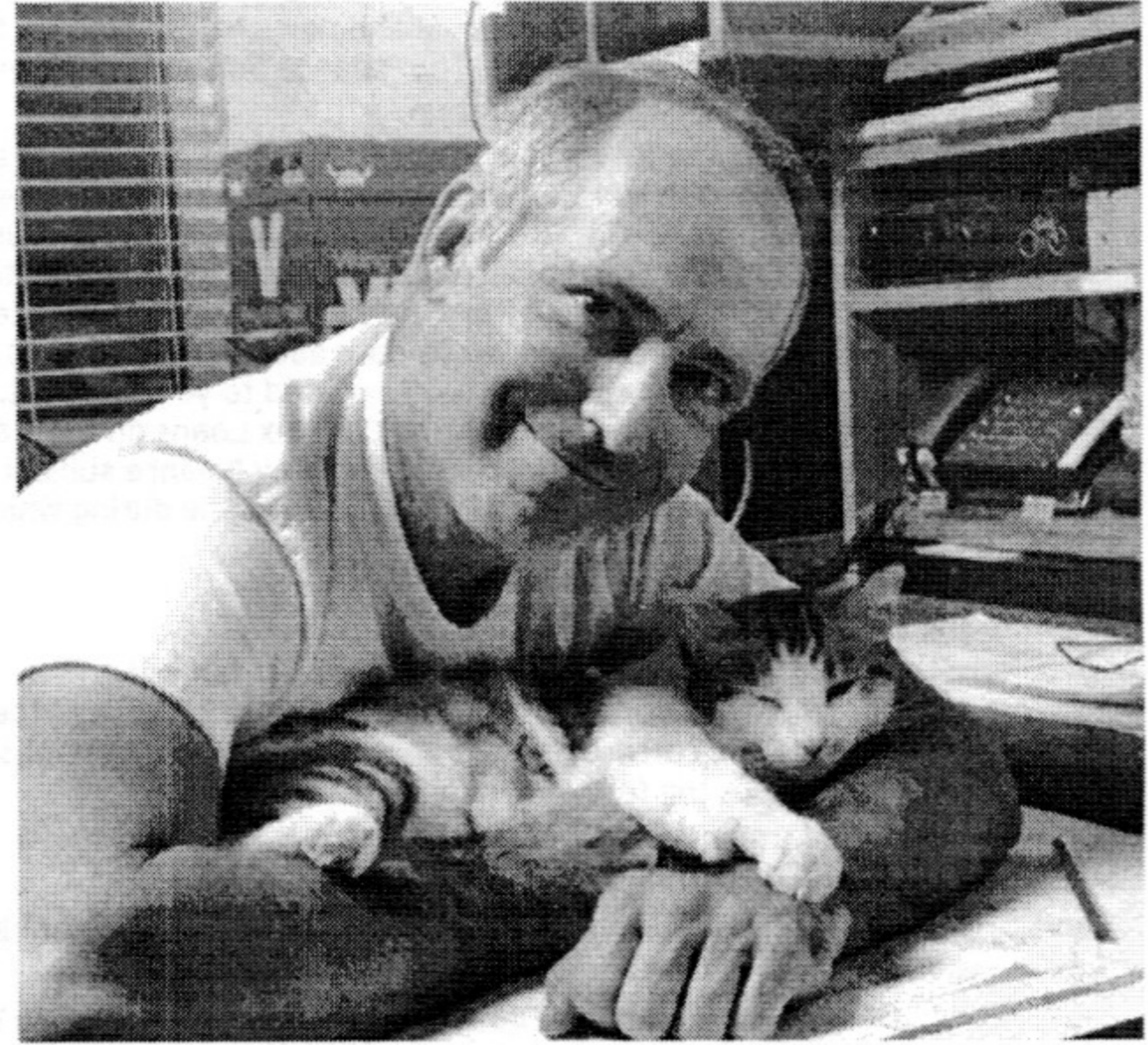
4) ... many investment accounts are NO LONGER mailing tax forms, they expect you to download the forms from their web site. If you have such income (Robinhood, E-Trade, Fidelity, Morgan Stanley, etc)... do not overlook sending me the tax forms.

5) My phone (510) 583 8035 is the most stable, reliable form of phone - a land line. PLEASE do not send text messages, I will not get them. I (once again) re-designed the web site, but use a computer - it does NOT seem to function on mobile devices.

6) If you have filed - or need to file - an amended return, it is taking 6-9 months for the IRS to process them. I am still waiting myself for a 1040-X I filed in April. Once you verify the return is received (which you can do from my web site) there is nothing else that can be done ... except to hurry up and wait.

7) The controversial 1099K / 1099-NEC law passed in 2021 - which would send a tax form to anyone selling more than \$600 of (used?) stuff online, or transferring money thru online apps (Paypal, Venmo, Zelle) - has been POSTPONED 1 more year.

8) Energy Efficiency Credits for home improvements have been expanded. General home improvements have NEVER been a tax item. Items that do matter - exterior doors, windows, insulation, heating / cooling systems, heat pumps, etc. The primary purpose of the improvement(s) has to be to lower your utility bills. Granite counter tops are very attractive, but they do NOT go on your tax return. ☺





9) EV Vehicle Credits have changed significantly. Some USED EV's now qualify and some NEW ones do not. If you think you qualify for this credit, use the lookup table at [fuelconomy.gov/feg/taxcenter.shtml](http://fuelconomy.gov/feg/taxcenter.shtml) to confirm this (I also placed a link directly on my web site on the "Before We Meet" tab). If you plan on taking this credit, E-MAIL me the Make, Model, Year, and VIN so I can copy and paste it into the tax return.

10) New on the worksheet for 2023 - Item #6 HSA (Health Savings Accounts). List amounts contributed that do not appear in box 12 of your W-2 and list amounts spent (distributed) that do not appear on your form 8889 (distributions).

11) Dropping off your tax forms? **OPEN** all forms, envelopes, **UNFOLD** everything, and place unfolded forms in a large envelope before depositing in my drop box.

12) If I ask you to send me specific information via e-mail, please type the requested information (actual text). Do NOT send me pictures of receipts or documents. I prefer to cut and paste numbers to maintain 100% accuracy. Not possible with pictures.

13) The fill-in PDF worksheets are designed to maximize the font size for easy readability. Apple devices seem to minimize the font size. Please fix this before you send me the document. If it is so small I cannot read it, it is useless.

14) Commonly missed items - Identity Protection PIN numbers (IRS mails these every year to anyone who requested them ) and Form 1095-A (subsidized health insurance). If you applied for this coverage it's easiest to download the form. Form 1098-T (Tuition Expense) is usually not mailed and should be downloaded also.

15) I do tax returns until July 15th, and then I am done. I had a weekend in Fremont this year when I refereed all day Saturday and after church Sunday. Ten matches total (all centers), 60 miles on the bicycle and 36 miles running. I do NOT want to come home and do tax returns after that. If you need more than seven months to organize your tax documents, please find someone else to prepare your return. My occupation changes once the soccer season has started.

16) I need you to use my worksheets - I don't do tax returns from information on post-it notes. Every worksheet is available on the web site. If it does not apply to you, leave it blank. Writing in a bunch of "zeros" in fields that should be left empty just distracts me from the actual numbers in the fields that ARE important.



17) Dependent Income is NOT your income. It goes on THEIR return, not yours. Yes, they can still be a dependent on your return if they (otherwise) meet the criteria.

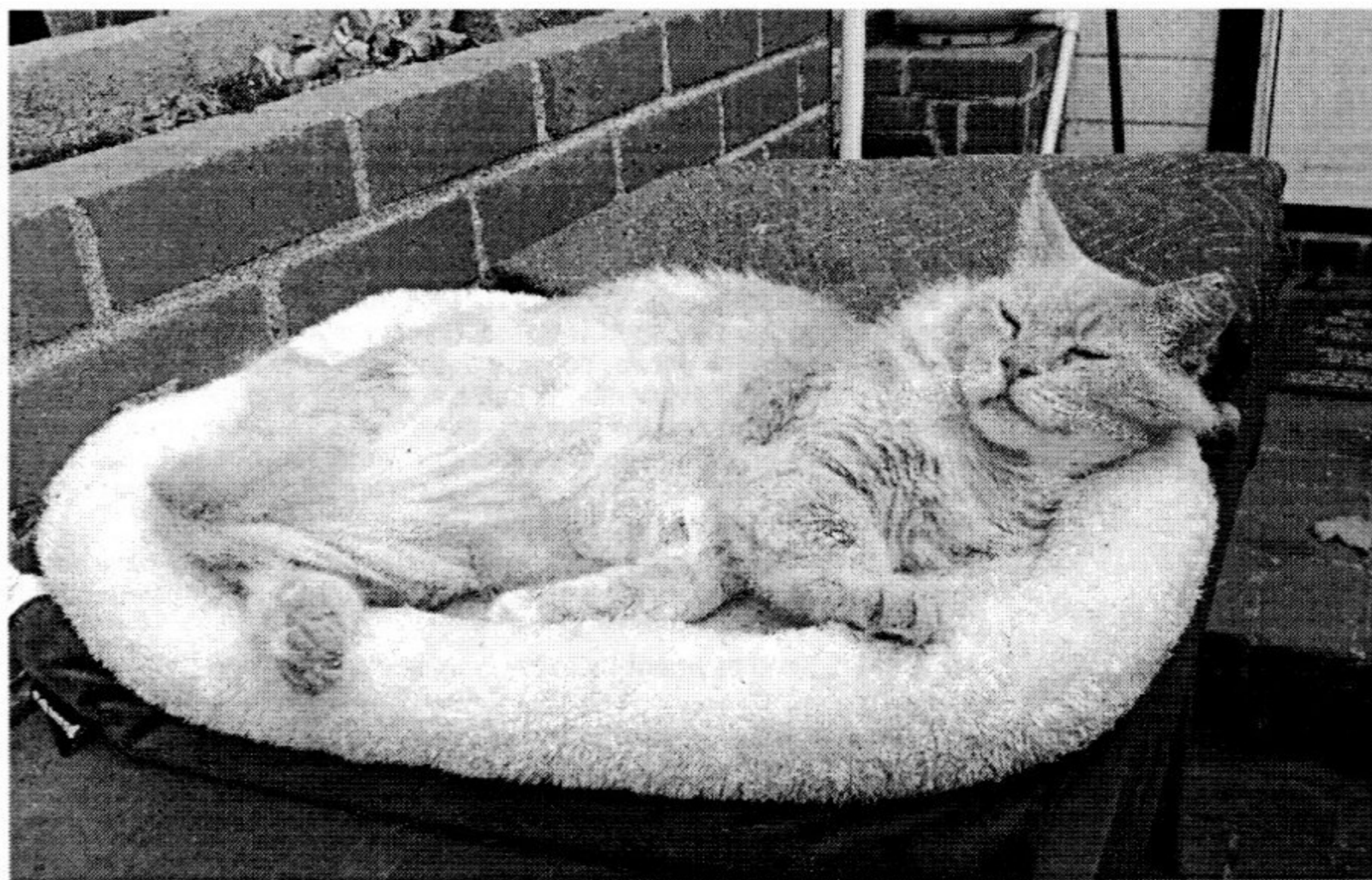
18) RECORD an outgoing announcement on your phone so I know I've reached the right party and I can leave a message. Otherwise - NO ID - I have to hang up ☹. Eventually I will just stop trying to contact you and move on.

19) Please use the correct "Income and Expense Statement" for your type of business (Sole Proprietorship, Partnerships, Corporations or LLC's)

20) That sound you heard in the living room is late December was just IRS agents sliding down chimneys, looking for any gifts that cost \$600 or more. Ignore it...

21) "Maxwell" is the latest addition, 10yo long-hair cream colored guy. Loves people, hates other cats. I was told that he did get along with other cats when I adopted him from the Hayward shelter. Not the best fit, but I committed to him, so he stays.

So Merry Christmas, Happy New Year, Peace, Good Will and Refunds to All!



*Stacy Spink*

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