

# PREMIER ACCOUNTING SERVICES, PC

Certified Public Accountants

P.O. Box 89

Pitman, NJ 08071

Phone: (856) 256-0330 Fax: (856) 589-2192

[www.premieraccountingpc.com](http://www.premieraccountingpc.com)

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## Tax Return Procedures for Tax Year 2023

Hello Clients. It's Tax Time again!

As in the past four years, we ask that you either drop off your tax documents into our locked drop box; mail them in; or upload them to your Smartvault portal account. If you need Tax, Financial or Retirement Planning we will schedule those appointments after Tax Season during the months of May to December.

Tax preparation fees for 2023 tax year returns are a *minimum* of \$350 per return. Returns with business, rental, or multiple schedules will be more. Preparation fees for dependents will be a *minimum* of \$125.00.

There are no scheduled drop-off dates, please **wait** until you are sure that you have received **everything** needed for us to prepare your tax return and then provide your documents to us. Receiving your documents at multiple times will result in delays and additional preparation costs; this includes documents uploaded to the portal. Therefore, please wait until you have everything and upload or drop off at one time.

Once you have all your documents, please provide them to us as soon as possible. Typically, early to late February we receive an extremely high volume of client documents and processing times will take longer due to the volume. We will do our best to keep you posted of any significant delays.

**PLEASE NOTE:** Any documents dropped off after March 15<sup>th</sup> may result in your tax return needing to be extended.

The following outline details the tax return preparation procedures and the various methods to provide your tax documents to us:

### 1. DOCUMENTS TO INCLUDE

- a. **Questionnaire and Tax Organizer – Complete and submit the taxpayer information sheet and questionnaire with your tax documents.** You can locate and print the taxpayer organizer and questionnaire found on our website at [www.premieraccountingpc.com](http://www.premieraccountingpc.com) under the “Resources” tab or download it from the Public Documents section of your Smartvault portal. Please call if you want a customized organizer mailed, emailed or uploaded to your Smartvault portal.
- b. **If you are submitting Medical Bills, Expenses, Donations** - Please provide a **total** for your medical bills, expenses, and donations (it is not necessary to include every receipt, bill, EOB, expense or donation confirmation). Providing a totalled list is sufficient.

### 2. DROPPING OFF, MAILING IN or UPLOADING DOCUMENTS

- a. **Mailing or Dropping Off** - please remove documents from the envelopes they came in and remove staples. **Mail to P.O. Box 89, Pitman, NJ 08071.** If mailing your documents, we strongly suggest you use priority mail in order to track the delivery. **Drop off** in one of the two lockboxes located outside the office at **40 N. Woodbury Road, Pitman, NJ.** The lock box is available 24 hours a day, 7 days a week and emptied multiple times each day.
- b. **Uploading** - If you prefer, upload your documents to your secure Smartvault Portal at [www.smartvault.com](http://www.smartvault.com) (Your username is your email and you created your password. You can reset it

if you don't remember by clicking on "can't sign in?" after you put your email address in the login screen). You can also find the link for the Smartvault Portal on our website located at [www.premieraccountingpc.com](http://www.premieraccountingpc.com) under the Client Portals tab; once there, click on Smartvault Portal. Please try to wait and **upload all your documents at one time after you have everything**. If you need additional support with regards to the portal, please let us know.

### **3. WHEN WE PREPARE YOUR RETURN**

If there are any questions when your tax return is being processed, your accountant/preparer or a staff member will call or email you, and if necessary, schedule a telephone conference or a zoom meeting to go over those questions.

### **4. AFTER PREPARING YOUR RETURN - SIGNING AND EFILING**

- a. REVIEW & SIGN 8879 AUTHORIZATION FORM.** Once your tax return is complete, a copy will be uploaded to your Smartvault portal for your review and the 8879 Authorization form, which authorizes us to E-file your return, will either be sent to you electronically through DocuSign; mailed to you; or we will call you to come pick up for review and signing. If you are signing a paper Form 8879 Authorization to E-file form, either drop in the locked drop box or mail it to us.
- b.** Be advised that once we receive your signed 8879 Authorization to E-file form, we will Electronically file your tax return, so **DO NOT SIGN THE 8879 AUTHORIZATION FORM IF you have additional questions or concerns after you have reviewed your tax return.** Signing the 8879 authorizes us to E-file, so please do not sign until those questions or concerns are addressed. Instead, contact the office and we will either schedule a telephone conference, communicate through email, or set up a zoom meeting to address those questions or concerns.

As always, anytime you have a question or concern, we are available via telephone at 856-256-0330 OR through an email to your tax preparer.

Sincerely,

John J. Fitzpatrick, CPA – [john@pascpas.com](mailto:john@pascpas.com)

Brian R. Masessa, CPA – [brian@pascpas.com](mailto:brian@pascpas.com)

Heather Tierney – [heather@pascpas.com](mailto:heather@pascpas.com)

Rachel Furman – [Rachel@pascpas.com](mailto:Rachel@pascpas.com)

Michele Cressman and the Staff of Premier Accounting Services, PC