

Dear Client:

In this packet you will find some information that will help you prepare for the upcoming tax season along with a 2024 magnetic calendar. If you prescheduled your tax appointment, you will also find a card with the date and time enclosed. If you want to change your pre-scheduled appointment or want to schedule an appointment, please call the office and our administrative staff will assist you. We do have other options available including phone or virtual appointments or drop off service. With today's fast paced world, many clients find it more convenient to mail, email, drop off, or upload their tax information to our secure site. If you would like to learn how to do this, please call the office and we can walk you through it.

Our extended Tax Season hours will be as follows: (Effective Monday January 29, 2024)

Monday -Thursday 8am to 6pm

Friday 8am to 5pm

Saturday 8am to Noon

We do, however, still need the annual information forms that are sent to you for tax purposes. As a reminder, here is a simple checklist.

- W-2 for wages
- W-2G for gambling
- 1099-Int for interest
- 1099-DIV for dividend
- 1099-B Brokerage
- 1099-SA for HSA's
- SSA-1099 Social Security
- 1099-Misc for income
- 1099-K for income
- 1099-R for retirement
- 1099-NEC for income
- 1098-T for tuition
- 1098-for mortgage interest
- 1099-G for refunds & unemployment
- Form 5498 for IRA values
- IRA and Roth IRA contributions for 2022
- K-1 forms from investments in S corporations or partnerships
- Childcare costs, and the name, address, amount, and ID # of the provider
- HSA Contributions and Withdrawals
- Charitable donations-total amounts and recipients (if you itemize)
- Property tax paid on your home and/or rent paid in Wisconsin.
- Estimated tax payments and dates
- Any letters you received from the IRS or state tax authorities.
- Any new banking information for Direct Deposit or EFT withdrawals
- Records of Virtual Currency Transactions
- Social Security Card and Date of Birth for New Dependents

If you purchased or sold a home or business property, please bring the HUD or Closing Statement.

If you have a small business, farm, or rental property you can get our worksheets on our website at aaiwi.com or call the office and we can get one to you.

We hope you find this information helpful, and you all had a great year! We are looking forward to working with you again! We appreciate your business.

Sincerely,

All of us at Accounting Associates, Inc.
Professionals working for you!



Back Left to Right: Jennifer Krachey, Jody Mayne, De Anne Chappell, Teesha Bacon, Regina Wagner
Front Row Left to Right: Mary Ellenbolt, Kathy Wagner, Christy McCartney, Shari Leis

Facebook: Accounting Associate Inc

Email : tax@aaiwi.com

Website : aaiwi.com

Telephone Number : 608-375-2727

Fax Number : 608-375-2555