

This Tax Organizer is designed to help you gather information needed to prepare your 2022 personal income tax return. When available, you will find certain data from your prior year return to help you complete the Organizer with minimal time and effort. We realize the amount of information we request can seem overwhelming, but providing it now helps to prevent excessive questions later.

If your Organizer pages are pre-populated, please review what has been provided and make any necessary corrections.

The Client Questionnaire asks about various tax items necessary for preparing the most accurate tax return possible. Please answer all questions thoroughly. Any additional documentation needed is outlined based on your responses.

Due the amount of tax returns Exemplar Accounting & Tax Advisors processes, IRS regulations require us to file them electronically. To comply with this requirement, your return will be filed electronically. E-filing is a secure way to file tax returns and it provides proof of acceptance that the IRS has accepted your return for processing. You can choose not to e-file, but will need to sign a form. Contact the office if you would prefer your return be filed on paper.

With the challenges we are faced with in regards to costs in technology, staffing, supplies, etc. we have made the decision to increase our preparation fees. **You may see a 10% increase reflected on your invoice.**

Here are some things that will help us with your tax return preparation:

- **In order to achieve our best efforts target, we need your 2022 tax documents to be in our office by Friday, March 24, 2023.** We try very hard to complete your taxes in a timely manner; in order to do so we need your completed Organizer, completed Client Questionnaire, signed Engagement Letter, signed Consent to Use of Tax Return Information Form, and all of your documentation in our office by the deadline. **We will not begin the preparation of your taxes without the SIGNED Engagement Letter and SIGNED Consent Form.**
- **We DO NOT need your medical or charitable receipts.** You should keep the receipts for your files, but a summarized list is all we need. Please create a list (Excel or handwritten are fine) with the totals for your expenses on your medical/dental and/or charity(s), amounts and charitable donations. A form to tally your charitable donations can be found here: <https://www.amazinggoodwill.com/donating>
- Staples make it difficult to review and scan documents. **Please do not staple your documents.**
- If uploading files electronically, PDF's are appreciated. Photos are harder to read.
- Please let us know if you would like to be put on extension by calling us at (815) 459-6720 or emailing us at info@exemplartax.com. We will have a few questions to determine if you should make any estimated tax payments.
- If Exemplar Accounting & Tax Advisors did not prepare your 2021 taxes, please provide copies of your 2020 and 2021 tax returns.

If you have any questions, please call our office at (815) 459-6720.

Thank you for the opportunity to serve you.