



Happy New Year and Welcome to the 2023 Tax Season! The IRS has officially announced that the 2023 tax filing season will begin on January 29, 2024.

While the 2023 tax year was absent from many tax law changes, we wanted to take this opportunity to remind our clients that several tax related forms have become wholly digital. What this means is that you may not receive all of your tax documents through your standard mail process. You may need to login to your online investment account to retrieve your consolidated year-end Form 1099 or onto your mortgage lender website to retrieve your annual Mortgage Interest Statement, Form 1098. This is particularly applicable if you obtained Marketplace coverage through healthcare.gov because we will be unable to electronically file your tax returns without your Form 1095-A. You must login to your healthcare.gov account to retrieve your Health Insurance Marketplace Statement, Form 1095-A. If you have difficulties obtaining any of your tax documents, please contact us and we will do our best to help.

The following pages are meant to help you gather your tax information and collect the documents that we will need to prepare your 2023 tax returns, which include:

- All tax documents you receive for tax year 2023
- [The 2023 Questionnaire](#) completed, with documentation or explanation regarding any "YES" answers
- [The 2023 Engagement Letter](#), signed

We will happily accept your tax data via your preferred method of delivery:

- **Upload:** Our client portal, accessible through our website, is a **SECURE** and convenient way to upload, store, and access all your tax records from anywhere. If you are interested, but you haven't used the portal in the past, please call or email us to set up your portal account.
- **Email:** tax@zimmerman-cpa.com OR use our secure email system to send sensitive documents. Click here [Click here](#) to send securely
- **Fax:** 513-624-3909
- **In Person:** You can drop off your tax documents (along with your signed engagement letter and completed questionnaire) **Mondays and Tuesdays 9-4:30pm** OR 24-hours a day in our lockbox located at the back entrance to the building. We will email a confirmation that we've received your documents. If you need to schedule a different time to drop off your information, please email us at tax@zimmerman-cpa.com or call us at (513) 624-3900.

Upon receipt of your tax information, we will begin working on your returns and contact you with questions or comments as they arise. We are committed to providing excellent service in a timely manner.

However, here is a reminder of a few things you can do to help expedite your return preparation:

- Spending a few extra minutes to carefully and thoroughly review the questionnaire and organizer, answering all the questions, and making sure you address all YES questionnaire answers.
- Submitting all of your tax documents together and minimizing the back-and-forth requests from us, can significantly reduce the time spent on your return.
- Providing us your information as quickly as possible.

As always, we are available to answer any questions you have. Thank you for the opportunity to continue working with you as we look forward to another successful tax season.