

# 2022 Tax Season News

Winter/Spring 2023

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## Greetings

Happy New Year and Best Wishes for 2023!

This year if you would like to schedule a meeting, please contact me via phone or email to set up. All meetings are by appointment only and must be scheduled in advance. (in person or Zoom/FaceTime). *If you do not have a scheduled appointment, please use my drop box.*

This tax season you may utilize my client portal for uploading your documents, drop off or mail them to me. A couple reminders – if you are a returning client, I do not need last year's tax return and please open/discard all envelopes before providing your info.

**Please complete the Tax Information Sheet that was mailed to you and include with your information (also on website). This form includes important information needed for preparing your returns.** Engagement letters will be included with your e-file forms this year.

Best Regards,

*Dottie*

## Drop Off & Pick-Up Area Along Driveway



## Pro Management Client Portal

Pro Management & Consulting Inc's Client Portal gives us the ability to securely share documents with one another. The portals are private, only you and PM&C will be able to see the documents we exchange. Upon your discretion, you may invite others (lenders, banks, etc.) to have access to your portal. Please note this system requires you to have a working email address.

A few notes about the system:

- Electronic copies of your returns are available upon request (please see 2022 Tax Information Sheet to request copies). Returns provided when preparing taxes are \$5. If done at a later date, the charge is \$20.
- Portal invites sent to your email address expire in one week. Please set up, even if you do not plan to use right away.
- There is a password reset feature. I do not have the ability to help you reset, I can only delete your portal (which may result in losing all documents) and re-invite. Please keep note of your password to avoid this.

**PM&C will no longer be accepting documents with confidential information through email.** The portal should be used for all confidential documents (unless providing in person or via mail). To be set up on the portal or if you have any questions, please call or email me.

### Office Hours:

- Typical office hours during tax season are:  
**Monday – Friday 9:00 – 5:00**  
**Saturdays 9:00-12:00 & many afternoons**
- Meetings available by telephone, Zoom/FaceTime and in person (must be scheduled in advance)
- Drop Off – see picture of drop off and pick up area on page 1
- Absolutely NO documents should be left in the mailbox at the end of the driveway (per US Postal Service regulations)

### When you owe....

Sometimes there is confusion when e-filing the tax return vs paying taxes owed. The two are independent of each other. You can still e-file your return, but either designate a later payment date (example 4/15/23) or mail your checks by 4/15/23.

### Circuit Breaker Credit:

Massachusetts residents who are 65 years of age or older, may be eligible for the circuit breaker credit. Please provide copies of your real estate tax bills for 2022 with your information so it can be evaluated. In place of copies, please provide amount(s) paid and total number of acres owned (credit limited to certain acreage).

### 2022 Mileage:

Please provide a copy of your mileage log or 3 numbers: Total driven, January 1<sup>st</sup> – June 30<sup>th</sup>, July 1<sup>st</sup> – December 31<sup>st</sup>. There are 2 different rates for 2022. All numbers must be entered on your tax return to take mileage/depreciation on a vehicle. This must be provided in writing.

### Key Filing Dates:

- March 15<sup>th</sup> – 1065 and 1120S (S Corporation) tax returns due
- April 18<sup>th</sup> – 1040 and 1120 (C Corporation) tax returns due

As always, the sooner you drop off your information, the sooner you can receive your refund or know how much you owe (due on due date of your return).

***I encourage everyone to provide information to me by March 1<sup>st</sup> for March 15<sup>th</sup> deadlines or April 1<sup>st</sup> for April 15<sup>th</sup> deadlines in order to avoid filing extensions.***

In order to ensure accurate filing, please provide all necessary documents together. Please be advised there will be an additional fee for amendments or reprints due to missing information.

### Estimated Payments:

Please complete the "Estimated Tax Payment" section on the "2022 Tax Information Sheet". This must be in your file and will ensure the correct information is provided to the IRS and avoid future IRS notices/issues.