

Dear Tax Client,

Believe it or not, tax time is upon us once again! The following information will help expedite the completion of your 2023 tax return. When you receive your all of your tax documents, please fill out the enclosed Tax Document Checklist. **Please sign** (you and spouse if filing jointly) the **Client Data Form** and review the questions/fill in the data on all the pages of the document. We understand this form is more robust that prior years, but it goes a long way in streamlining our preparation.

There are a few options for sending us your information:

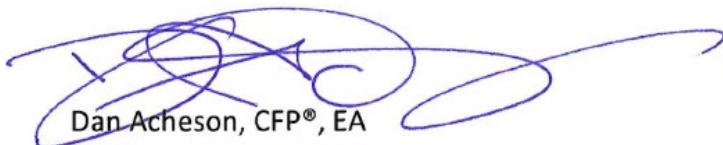
1. Once again, this year, you can upload your files on our client portal at <http://www.munnwealth.com/tax> by clicking on "Upload Completed Tax Forms".
2. You can also mail or drop off your tax information at our office. If you have any questions or would like to schedule an initial meeting you can contact Robert Lange directly via tax@munnwealth.com or **419-794-0536**, and he will schedule a time to meet with Dan Acheson. Our mailing address is as follows: **Munn Tax Services 1700 Woodlands Drive, Suite 100 Maumee, OH 43537**

Things to be aware of for 2024:

- We welcome the addition of John Haessler, CPA, to our staff and are excited to work with his clients. John will be serving as support throughout the preparation process, and will be an arm's length away to answer questions and ensure his clients' returns are being prepared properly during this transition.
- Robert Lange will serve as primary support staff this season. If you have any questions regarding your return, please email tax@munnwealth.com, or call 419-794-0536 and ask for Robert.
- To ensure smooth preparation and service, we ask that you fill out the accompanying intake form, as well as submit all pertinent tax documents once they have been received. If we are waiting on documents or confirmation of information needed to prepare your return, the timeframe needed to complete your return will be longer than anticipated.
- We will be operating this tax season as normal and anticipate the April 15, 2024 tax filing deadline.
- If you are waiting on 1099s or (publicly traded) K-1s held with Munn Wealth Management, we can retrieve these online for you when they become available. Please note on the checklist what you are waiting for and keep in mind that 1099s from *Folio Institutional/Goldman Sachs* will be among the last documents to arrive in late March.
- We are requesting that everyone try to have their tax information into us no later than Friday, March 29, 2024. If you drop off after March 29th, we will do our best to meet the tax filing deadline. However, if we cannot complete your return before the deadline, we will file an extension for you.

We look forward to working with you again this year!

Kind regards,



Dan Acheson, CFP®, EA

tax@munnwealth.com

Munn Tax Services, Ltd.