

Fitzpatrick & Goguen CPAs P.C.

164 CONCORD ROAD – BILLERICA, MA 01821

TEL. (978) 667-4595 FAX (978) 667-4597
EMAIL: office@bgoguen.com

January 16, 2024

To Our Clients and Friends,

It's that time of year again – tax season! We hope 2023 was a happy and prosperous year for you. Enclosed is your 2023 Tax Organizer - It is important that you return a completed tax organizer as it lessens the likelihood of accidental errors or omissions from your tax returns. Please pay especially close attention to changes in contact information or address, changes to marital status or dependents, or any one-time transactions such as stock sales, IRA or 401k distributions, or the purchase or sale of property.

Your options to provide our office with your tax information are:

- You can upload your tax organizers and tax documents through our new secure portal. We have decided to transition to a new client portal and online organizer through TaxDome - you will receive a link by the end of January to open your account. Please note that if you choose to upload your files it **must be done through the portal**.
- You can mail or drop your tax information in our locked mailbox next to the office door

For data security and privacy reasons to protect your personal information, our office has adopted a policy of **not accepting documents sent by email attachment**. Please **do not** send your tax files as an email attachment.

It is important to get your complete tax information to us by **Friday, March 15, 2024**. If our office does not receive your completed tax documents by the above deadline, we cannot guarantee being able to complete and coordinate the filing of your tax return by the April 17, 2024 filing deadline, and instead will file an extension of time to file on your behalf.

Finally, remember to follow the golden rule - "*pay yourself first!*". Early in the year is a good time to set up a new IRA, ROTH or a 529 education account or to increase the amount you are contributing to your current retirement plans. Please let us know if you have any questions on setting up any of these accounts.

We would like to thank you for placing your faith in us to handle you tax and financial matters.

Referrals are the highest compliment we could receive and are critical in our business!

Sincerely,

Fitzpatrick & Goguen CPAs P.C.