



DEBOER, GOODYKE, KAHLER & TUTTLE P.C.

certified public accountants and business consultants

DGKT Clients –

It is early 2024, and we hope this letter finds you well. Tax season is quickly approaching, and we want to pass along important information related to completion of your tax returns. You will find two documents enclosed with this letter:

- **Client Information Sheet.** It is extremely helpful to us if you take a few minutes to provide up-to-date information. We have included a “No Changes” box this year.
- **Client Checklist.** This checklist is to help you compile pertinent information for completion of your tax returns. It is not exhaustive, but it should cover most items that are generally used in tax return preparation.

Changes for 2023: Tax credits for energy efficient home improvements are now more widely available. The previous lifetime exclusion has been eliminated. Most of these credits are available for qualified improvements to your principal residence and may be taken for the year of installation, as opposed to the year purchased. For more details, please visit our website (www.dgkcpa.com).

One useful tool that more and more taxpayers are using is an online account with the IRS. This online account enables you to access tax records, make and view payments, view any balance due, and create a payment plan. The IRS uses **ID.me** to set up your secure online account. Visit our website for a link to the IRS page that helps with setup.

We will continue to use e-signatures whenever possible, so our having your email address(es) is vital. On a joint return we need a unique email for each taxpayer, so please keep this in mind.

Please drop off, scan, or mail your complete 2023 documents to us as soon as you’re able. If you choose to send documents electronically to us, please DO NOT text photos of documents. The safest way to send documents electronically is via a secure link; if you need a secure link, please let us know and we will email one to you. If you’re waiting for one or two documents that typically come late, feel free to get your other documents to us and let us know what’s missing.

If you have any questions, please call us at 616-669-4141. Thank you for your confidence in us – we look forward to working with you.

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