

Dear Client,

Revised: 01/10/2024

**ACC-U-RITE TAX** is once again ready to assist you in the preparation of your 2023 Income Tax Return. To request a specific preparer, **PLEASE** call ahead to ensure that they are available when you come in. More details on everything listed on this postcard are on our website.

We continue to offer three options for tax preparation. We offer 'live' in-person tax preparation, drop off tax preparation, or using our portal to securely upload and download tax documents. The portal is available for any established clients, simply call our office for personalized access. For anyone who utilized the portal last year, your portal login remains the same. Be aware that the portal does have a new look due to recent upgrades and improvements.

There have been **SEVERAL TAX LAW CHANGES** that impact 2023 tax returns. As always, bring in your normal tax documents and any new items that may apply for this year.

**RESIDENTIAL ENERGY CREDITS:** The Inflation Reduction Act of 2022 updated and substantially increased tax credits for improvements to your principal residence. In **SOME** select cases (**BUT NOT ALL!**) your second home and/or new construction may qualify! If you purchased any Clean Energy Systems or Energy Efficient products in 2023, bring in the Energy Efficiency Rating, the Billing and Payment information, and the Installation Date. This is now an **ANNUAL** tax credit through 2032, so talk with your preparer about how to maximize this tax credit over the next decade. More details are on the website.

**DEPENDENTS:** Remember to bring in documentation that shows your name, address, and your child's name that can be kept with your tax records. Please refer to the Qualifying Child Worksheet, available on our website or in our office, for the list of additional paperwork needed to claim certain tax credits.

**MARKETPLACE HEALTHCARE!** If you had health insurance through the Federal Government Marketplace (also referred to as 'Obamacare') **for any part of the year**, you will receive **Form 1095-A**. Your tax return will be rejected by the IRS without Form 1095-A! Forms 1095-B and 1095-C may be sent to you if you had health insurance from any other source, such as your employer. Forms 1095-B and 1095-C are not required to prepare your return, but please bring them along anyway.

**NATIONWIDE ELECTRONIC FILING START DATE:** The IRS will open E-Filing on January 29th, 2024. This is the first date that the IRS and State of Wisconsin will accept any tax return from anyone. However, your tax return can be prepared at any time prior to the IRS opening E-Filing and will be automatically processed on the E-Filing start date.

**NOTE:** While your tax return will be transmitted to the IRS on the E-Filing start date, per Federal Law, **ANY** return containing the Earned Income Tax or Additional Child Tax Credits will have refunds delayed by the IRS until February 15th or later.

**PLEASE GO TO OUR WEBSITE  
WWW.ACC-U-RITE.COM**

**ALL CLIENTS MUST COMPLETE THE  
CLIENT CHECKLIST. FROM HOME PAGE  
CLICK ON CLIENT REQUIRED DOCUMENTS,  
THEN CLIENT CHECKLIST AND WORKSHEETS.**

**DO YOU HAVE?**

- ◆ Rental Property (Sch E)
- ◆ Small Business (Sch C)
- ◆ Gambling Income (W2-G)
- ◆ Auto Mileage / Expenses
- ◆ Dependents / Child Tax Credit
- ◆ Earned Income Tax Credit
- ◆ Head of Household Filing Status
- ◆ College Tuition
- ◆ Student Loan Interest
- ◆ Private School Tuition (K-12)

**HELPFUL GUIDES, CHECKLISTS AND SUMMARY  
FORMS FOR THESE ITEMS ARE ON OUR WEBSITE.  
THEY ARE ALSO AVAILABLE IN THE OFFICE  
OR BY MAIL UPON REQUEST.**

**Please note our new Tax Season Hours!**

Monday through Friday: 8 AM to 7 PM • Saturday: 8 AM to 1 PM • Sundays: CLOSED



Authorized IRS  
E-File Provider

Faster, More Accurate Refunds



**Acc-U-RITE**  
**More than just Taxes!**  
**TAX & FINANCIAL SERVICES**

6320 W. Forest Home Avenue  
Milwaukee, WI 53220  
414-541-4900  
[www.acc-u-rite.com](http://www.acc-u-rite.com)