



DECEMBER 2022

OUR ONLINE CALENDAR IS AVAILABLE!

Go to pelandassociates.com to schedule your tax appointment as soon as you are able. This system will allow you to select the date, time, and type of appointment that is most convenient for you. It will also provide you with notifications and appointment reminders via email and text if you opt in.

You may reschedule your appointment up to ten days prior to your appointment if needed.

If you have trouble with the website or have any questions, please call our office for assistance.

2022 Tax Season Appointment Options

IN-PERSON APPOINTMENTS WITH KARI PEL, EA: Aside from Pilgrim Place appointments, all In-Person Appointments will be held in our Cypress office. Please arrive at our office with your documents in hand 15 minutes prior to your appointment with Kari, so that our office can greet you and make sure that we have the documents we need. Be prepared to wear a mask when you are in our office. These appointments are not prescheduled, so please go to pelandassociates.com to schedule your In-Person Appointment today.

REMOTE APPOINTMENTS WITH KARI PEL, EA: Clients may choose between Phone appointments and Zoom appointments. For all Remote Appointments, we will need to receive your tax documents with enough time to review them before you meet with Kari. You must upload or fax your documents at least one week prior to your appointment or you may mail your documents two weeks prior to your appointment. These appointments are not being prescheduled. Please don't wait until you send in your documents to schedule as the calendar may fill quickly! The full calendar is now open, so please go to pelandassociates.com to schedule your Remote Appointment today.

PILGRIM PLACE APPOINTMENTS WITH KARI PEL, EA: Kari is very excited to be visiting Pilgrim Place again this year! She will be on location on the following Thursdays: 2/9, 2/23, 3/9, 3/23, and 3/30. If you are a resident of Pilgrim Place and would like to have Kari visit you to prepare your return, please call the office today.

PHONE APPOINTMENTS WITH DR. PAUL R. MCREYNOLDS, EA: If you normally work with Dr. Paul, the process has not changed. Please send us your documents when they are available, and he will contact you after he has reviewed them.

Meet Our Support Staff

This year, *Sabine Galvan*, *Emily Galvan*, and *Maha El Ouaer* will be our administrative team. Sabine joined Pel & Associates in 2021, and she has been such a gift. Emily and Maha are new to our team this year. Both are students; Emily is studying Film and Religious Studies, and Maha is studying French and Psychology. All three will be able to help you with scheduling, documents and any other administration questions or issues that you may have. We are very excited to have them join!

Dr. Kelly Douglas, EA will be assisting Kari with preparing tax returns, as she is now an Enrolled Agent. She is also a minister, so she can answer questions about taxes and especially how they relate to ministers. She may be reaching out to you directly this tax season for questions and clarity.

Important Information Needed for 2022 Tax Returns

In 2022, the Mileage Rate was changed halfway through the year. Please be prepared to report your mileage separately between January 1, 2022-June 30, 2022 and July 1, 2022-December 31, 2022. Here are the rates:

Rates January 1, 2022 – June 30, 2022

Business: 58.5 cents/mile

Medical/Moving: 18 cents/mile

Charitable: 14 cents/mile

Rates July 1, 2022 - December 31, 2022

Business: 62.5 cents/mile

Medical/Moving: 22 cents/mile

Charitable: 14 cents/mile

Tips

- ✓ Preparation: Please send in documents *at least one week prior* to your remote appointment, even if you don't have everything yet. This allows Kari time to review everything and be ready for your appointment. If you are mailing, you can send us copies of all the documents and keep the originals. If you will be uploading scanned documents, upload one combined file formatted as PDF. Other formats are not accepted (JPEG, PNG, etc).
- ✓ Please add up all receipts and provide a total with your documents BEFORE your appointment.
- ✓ Not sure if you should continue to itemize? Itemizing may still be an important benefit for you on your Federal or State Tax return. Please fill out the Organizer so we can best serve you and help you experience every deduction you are entitled to. Contact us with any questions related to your specific situation.
- ✓ **Organizer Tips** If you would like to receive a more detailed organizer that lists last year's information alongside space to enter in this year's information, please call or e-mail the office. We will get one out to you right away.
- ✓ Check W-2's and 1099's: Please check for accuracy BEFORE your appointment.
- ✓ If you sold stock: Make sure to provide your 1099-B Forms AND the cost basis information.
- ✓ If you sold a home: Please provide closing statements for the purchase and sale.
- ✓ Please provide any forms 1095-A, 1095-B, 1095-C received. These forms include important information we need relevant to the Affordable Health Care Act.
- ✓ DMV Fees: Remember, only the license fee, based on the value of the vehicle, is deductible on your tax return. For California vehicles, the deductible portion is listed on the bill as "License Fee" with the verbiage, "This may be a tax deduction" next to it. Please have this information available at your tax appointment. You can also check out the DMV website at www.dmv.ca.gov for more information.
- ✓ Medicare Premiums: In the medical section of the Tax Organizer, please indicate whether you have included your Medicare premiums as part of your insurance premiums. We want to make sure we are not duplicating this information as it is also reported on your Social Security Statement (Form 1099-SSA).
- ✓ State Estimated Payment: If you had a large increase in income during 2022, it might be wise to make your state tax payment before December 31, 2022. The amount may be deductible on your federal return as an itemized deduction. (Sorry, the federal tax payments are not deductible on the state return). To verify that a pre-payment of State income tax would be of benefit to you or if you have any questions, please call the office.
- ✓ SPECIAL NOTE FOR MINISTERS: *Establishing your 2023 Housing allowance*. Remember, your housing allowance should be established each year and in advance. This firm recommends that you establish your 2023 housing allowance in December.
- ✓ For more information and instructions, visit pelandassociates.com

Additional Fees

No Appointment: If you don't have an appointment and you send in your information after March 15 an additional fee of \$25 is applied. Starting April 1, the fee increases to \$50 and we may recommend going on extension which will allow us adequate time to thoroughly prepare your return.

Extension: For all clients who go on extension, there is an agreement to sign and a deposit of \$25 (This is not an additional fee.)

Cancel/Reschedule appointment: We ask that you schedule your appointment carefully. If you do change your appointment less than ten days prior to your appointment, you may be charged a \$50 fee.

May you have a joyful Christmas and a Happy New Year!

Kari Pel, EA, CFP® Dr. Paul McReynolds, EA Dr. Kelly Douglas, EA
Sabine Galvan, Emily Galvan, Maha El Ouaer



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