Pel & Associates
Serving Your Financial & Tax Planning Needs
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2023 Winter Newsletter

Our Calendar is Open!

Go to pelandassociates.com to schedule your tax appointment as soon as possible. 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/or text. *You may reschedule your appointment up to ten days prior to your scheduled time.*

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

IMPORTANT!!

We will no longer be using Cloud Cabinet as our online document storage as we have in years past. Our new solution is called SecureFilePro, a cloud system that partners seamlessly with our tax preparation software. As a returning client, when you make your tax appointment, you will be given the opportunity to set up your new account. A link will be sent by email. As a security measure, you will be asked to confirm the last four digits of your Social Security Number. Once you have set up your account, you can upload documents in preparation for your tax appointment, and download the app onto your smartphone. If you need assistance, please contact the office. We will be happy to help you.

2023 Tax Season Appointment Options

Our schedule fills fast! There are no reserved appointments except for our Pilgrim Place (a retirement community) appointments described below.

In-Person Appointments in Cypress with Kari Pel, EA & CFP®	**Zoom Appointments with Kari Pel, EA & CFP®**	**Phone Appointments with Kari Pel, EA & CFP®**	**Phone appointments with Dr. Paul R McReynolds, EA**
Except for the Pilgrim Place appointments described below, our in-person appointments will be held in our beautiful Cypress office. If possible, it can be helpful if we receive your information *one week prior to your scheduled time*. -	If you want to see a face without the drive to Cypress, we have appointments available by Zoom. These appointments are 30 minutes long. Please note information MUST be received *one week prior to your scheduled time*.	30 minute phone appointments are also very effective. Kari will call you at the time of your appointment. Please note information MUST be received *one week prior to your scheduled time*.	If you normally work with Dr. Paul, **the process has changed slightly**. He will still call to discuss your return over the phone, but you can now schedule the time of the call by visiting our website.

To Pilgrim Place Residents:

Your in-person appointment with Kari has been prescheduled. Please contact us to confirm or reschedule this appointment time.

Your appointment time:

Scheduling Musts!

Appointments: Based on prior years, we know our schedule WILL fill up quickly. If you contact us and appointments are full, we can add you to a wait list to fit you into any appointments that open up. This is NOT a guarentee of an appointment and we may still discuss filing an extension.

Extension: These appointments will begin in May. For all clients who go on extension, there is an agreement to sign and a deposit of $25 (This is not an additional fee.) An extension is an extension to file, NOT an extension to pay.

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.

Pel & Associates Team:

Tax Operations Manager	IT Manager & Office Assistant	Owner & Tax Preparer	Office Manager	Founder & Tax Preparer
Dr. Kelly Douglas, EA	Emily Galvan	Kari Pel, EA & CFP®	Sabine Galvan	Dr. Paul McReynolds, EA

TAX TIPS

Our Process

HOW OUR TEAM IS WORKING HARD FOR YOU!

1. APPOINTMENT MADE
You schedule an appointment for your preferred date and time!

2. DOCUMENTS COLLECTED
You send us your documents via uploading, faxing, or mailing. Our office team receives the documents and alerts Dr. Kelly Douglas, EA.

3. DATA ENTERED
Kelly reviews the documents and enters the information into our tax software. She may also reach out to you for clarification prior to your meeting with Dr. Paul or Kari.

4. INFO REVIEWED
A week prior to your appointment, your information will be reviewed. This allows Dr. Paul or Kari to be prepared for your meeting, and to insure that the appointment is as effective as possible.

5. RETURN PREPARED
After Dr. Paul and Kari have completed the expert preparation, the Admin Team will facilitate uploading or mailing the prepared documents to you. They will also aid in receiving e-file authorizations and e-filing your return after you have had opportunity to review it.

- **Please add up all receipts and provide a total with your documents BEFORE your appointment.**
- **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 email the office. We will get one out to you right away.**
- **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.**
- **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.**
- **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 2023, it might be wise to make your state tax payment before December 31, 2023. 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 2024 Housing allowance. Remember, your housing allowance should be established each year and in advance. This firm recommends that you establish your 2024 housing allowance in December.**

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

Mail: P.O. Box 400, Los Alamitos, CA 90720 Fax: 866-279-4916

SecureFilePro: Our new online document storage solution
Email: admin@pelandassociates.com

For your security, we do not recommend sending any private information except through mail or SecureFilePro.