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Organizers Have Been Posted to Portals and Mailed

Organizers were sent to your Coleman Portal on January 14th. The email notification was titled "Organizer Available on your Coleman Portal" from info@colemancpas.com.

Paper Organizers were mailed on January 26th.

Please be sure to read the 2023 Cheat Sheet for the information required to begin processing your tax return.

Questionnaire Now a PDF Fillable Form!

You can find a fillable PDF of the Organizer Questionnaire on our website under [Resources\Forms, Documents & Links\ Tax Questionnaire](#).

Engagement Letters Have Been Sent

We used DocuSign for many of our engagement letters again this year. We hope you found the process simple and easy to use.

All 1040 engagement letters were sent via DocuSign or mailed over the last two weeks. Portal users, the engagement letters are not on your portal.

***REMINDER* - Married couples must both sign the engagement letter.**

Welcome Basak Koc and Giles Lemmens!



Basak graduated from Yasar University with a Bachelor of Arts in International Trade and Finance. Prior to joining the firm, she worked supporting various clients with financial and insurance services.

Basak currently lives in the northwest suburbs with her husband and their Doodle Sonny. Basak enjoys spending time with her family and most importantly quality walks with her best friend Sonny.

During her free time, Basak finds joy in swimming, travelling and being outside. In the summer months you will find her on a farm picking fresh tomatoes for canning and preparing for the winters.



Giles Lemmens is joining the firm part-time for tax season this year to help with 1040 preparation.

Giles is a Chicago-based nonprofit professional with a concentration in finance and operations. Giles is currently the Manager, Finance and Administration for Music Will, a national music education nonprofit. Previously, he served as the Finance and Administration Manager for Chicago Arts Partnerships in Education and as the Executive Director for Windy City Performing Arts. He has experience working with nonprofits on improving financial systems, implementing automations and efficiencies to increase their administrative capacity.

Outside of work, Giles can be found in the kitchen trying out a new recipe, running his dogs Jack (a one-eyed Shih Tzu mix) and Cash (a border collie) in agility, or spending time exploring restaurants in the city with his wife and friends.

How to Pay Your Income Taxes

The April 15th deadline for individuals to file and pay your income taxes is fast approaching. While paying taxes is not optional, you do have options when it comes to how to pay your taxes.

These options are available for your balance due and your quarterly estimated taxes, if applicable.

IRS Options

The Internal Revenue Service offers a variety of payment options summarized below. You can find out more and get started at <https://www.irs.gov/payments>

Illinois Options

The Illinois Department of Revenue offers a variety of payment options summarized below. You can find out more and get started at <https://tax.illinois.gov/individuals/pay.html>

Other states will have similar options. Start with a Google search or ask us for help finding the options for additional states.

Dropping Off Tax Documents on a Saturday?

If you plan drop off your tax documents on a Saturday, here's what you need to know:

1. Put your documents into a sealed envelope
2. Check in at the security desk for assistance with the elevator
3. Deposit your envelope into the secure mailbox to the right of our suite entrance
4. We will confirm receipt on the next business day.

What about Sundays? The building access is more restrictive on Sundays, therefore, please do not attempt delivery on Sundays.

Your New Portal Experience

Your Coleman Portal sign-in experience has been modified by our portal platform provider to improve security.

The platform for your Coleman Portal continues to be provided by Thomson Reuters. Thomson Reuters has upgraded to a more advanced Multi-Factor Authentication system that further enhances the security of your Coleman Portal.

What you need to know:

- ✚ **You'll need to create a new username and password.** To get started and link to your current portal, you need your current NetClient CS login ID and password. If you've forgotten your login ID or password, please send an email to info@colemancpas.com.
 - Passwords will no longer expire after 90 days.
 - User names and passwords are hidden from us.
- ✚ **The sign-in page will look different but will function the same way.**
 - This [video](#) showcases the new experience
 - [Here](#) is a step by step guide that further supports the content within the video should you prefer this format.
- ✚ **You'll need to enable two-factor authentication.** There are several options available to verify your identity when you log in. We recommend using the Microsoft Authenticator or Auth0 Guardian mobile app, which are free in the Apple [App Store](#) for iOS and [Google Play Store](#) for Android. [Learn more about two-factor authentication.](#)
 - Using in Microsoft Authenticator or Auth0 Guardian app is the most secure option.

If you're having difficulties, contact the office by emailing us at info@colemancpas.com or calling 773-444-3100 and we can work with you to troubleshoot further.

As always, contact the office with questions by emailing us at info@colemancpas.com or calling 773-444-3100. We are here to help.

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