

# David N. Hainsworth, C.P.A., P.C. *Happenings*

Newsletter for clients and friends of David N. Hainsworth, C.P.A., P.C.

March 2024

## Personally speaking...

We hope your year is going well and that tax season is going smoothly. Please review the following portal security features for your NetClient CS account:

- Thomson Reuters rolled out a new log in for your portal which requires clients with a portal prior to 12/31/23 to migrate over to the new system. Passwords will no longer have to be changed every 90 days and the sign in includes 2 factor. IF you have not accessed your portal, please let us know if you need any assistance.
- Your portal log in will now be the email on the account (no unique user name)
- After 30 minutes of inactivity, your portal session will time out.
- Load your tax supporting documents with your organizer before sending.
- SAVE OFTEN!

**E-FILING/ Direct Deposit:** All filings with the IRS and your states are done through the e-file process. We highly recommend choosing direct deposit for your refunds. It makes accessing the “where’s my refund” status more immediate. If you need to update your Direct Deposit information, or to add Direct Deposit for the first time, please do so in the organizer on the page asking for Direct Deposit Info. You will need to provide your bank name, routing number, your account number, and type of account the deposit will go into (checking or savings).

## EXTENSIONS:

**We will not automatically file an extension unless you request us to do so in writing by April 1st (email).**

To file a federal or state extension, we will need the following:

- Name, address, and social security number(s)
- Total federal tax liability
- Federal income tax withheld
- Federal estimated tax paid
- Federal extension payments
- Total state liability
- State income tax withheld
- State estimated tax paid
- State extension payments



- Payments can be made electronically either by paying online or having the balance due withdrawn from your account (we would need your current banking information).
- Checks or money orders for Federal are made payable to the U.S. Treasury and state information will vary.

Once an extension is filed, you automatically have until October 15th to file your return. *Remember, an extension only extends the time to file, not the time to pay additional taxes owed, and it does not increase your chances of being audited.*

Payments made after April 15th are always subject to late payment penalties and interest even if a timely extension is filed. If you believe an extension is necessary, please confirm with us by April 1, 2024.

## In Closing

As we do every year, we hope everyone receives a small refund. If so, you have made sure to keep as much money in your account over the year rather than waiting for the government to return it back to you. Wishing you all a smooth and easy tax filing season!

*Dave*

— Dave Hainsworth, C.P.A. —

MARCH 2024							APRIL 2024							MAY 2024						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
					1	2														
3	4	5	6	7	8	9														
10	11	12	13	14	15	16														
17	18	19	20	21	22	23														
24	25	26	27	28	29	30														

**April 10** Extensions submitted by HCPA to tax agencies; Final date for E File forms submitted to HCPA

**April 15** Federal deadline for submission of tax returns: 1040 & C Corp

**April 18** HCPA deadline for organizer submission to complete taxes by April 15, 2024

**April 6** Final date to deliver extensions to HCPA (with payments)

**May 1** Virginia state deadline for submission

**April 19** HCPA office is closed

# Finn's Follies

Spring is finally in the air! I am so happy to have seen most of you who stopped by or had an appointment this year with my Dad. Now I am excited to get back to the beach and swimming and boating after April 15th deadline hits and another tax season bites the dust! I will miss the quiet lounging under the conference table while you discuss your year in review with the bossman, but swimming trumps office time any day in my books. I am happy to see the sunshine, sand, and water. I look forward to protecting my beach from the lingering geese who lost their way back home or want to stay longer. Enjoy the spring and getting outside to enjoy yourself with family and friends.

Wags,  
Finn



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Design & Typesetting by  
Blue Room Studio

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