

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

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

January 2024

We hope you enjoyed your holiday season and that it was filled with wonderful moments. We certainly celebrated our time with friends and family. We welcome the 2024 New Year and we wish you much health and prosperity in the year ahead!

For the 2024 tax season, we want to give you all the tools and guidelines to facilitate a cohesive tax experience.

CLIENT ORGANIZERS

By the third week of January, we will have initiated your Client Organizer.

The first step for all clients is to sign your engagement letter!

- **ELECTRONIC ORGANIZER:** You will receive an e-mail with instructions to log onto our website, www.hainsworthcpa.com to access your secure portal. Thomson Reuters (our software provider) initiated a new portal login which clients will need to migrate over to access your portal. Please contact us if you need us to e-mail you the instructions.
- **PAPER ORGANIZERS:** Will be sent via USPS. If you are ready to go electronic, we will walk you through the process! Please note there is a questionnaire that should be completed along with the other pages and if the organizer is returned blank, our fee will be increased for the time to complete it for you to begin your tax preparation.
- **SUPPORTING DOCUMENTS:** Provide all pertinent backup documentation, W-2s, 1099s, interest statements etc., to initiate the tax preparation process. These documents can be sent to us paper copy or uploaded with your organizer. Please scan documents (not photos if possible) for best quality. Please do NOT email tax sensitive documents for your security.

Once you have reviewed your organizer and uploaded your supporting documents, "send to preparer". When that step is completed, you may load additional documents via your "file exchange".

"First in, first out" is our philosophy when processing returns. We feel that this is the most equitable way to serve our clients.

JANUARY 2024						
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			
28	29	30	31			

January 31
Notify us if you have not received your organizer (paper or electronic)

MARCH 2024						
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				2	23
24	25					

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

APRIL 2024						
S	M	T	W	T	F	S
			3	4	5	6
			10	11	12	13
			15	16	17	18
			19	20		
21	22	23	24	25		
28	29	30	31			

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

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 19
HCPA office is closed

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

May 1
Virginia state deadline for submission

IMPORTANT DATES: (good to note in your personal calendars!)

- **January 31st:** Notify us if you have not received your organizer (paper or electronic)
- **March 18th:** HCPA deadline for organizer submission to complete taxes by April 15, 2024
- **April 6th:** Final date to deliver extensions to HCPA (with payments)
- **April 10th:** Extensions submitted by HCPA to tax agencies
- **April 10th:** Final date for E File forms submitted to HCPA
- **April 15th:** Federal deadline for submission of tax returns: 1040 & C Corp
- **April 19th:** HCPA office is closed
- **May 1st:** Virginia state deadline for submission

ONLINE PAYMENT OPTION: Hainsworth CPA began offering the option to pay invoices via our website. Select the tab "Pay Bill" on the home page of www.hainsworthcpa.com. You can choose e-check and/or credit card options. There is no fee to use e-check and there will be a nominal fee for credit cards which will be calculated on the screen. Enter the amount you would like to pay and in the reference box please enter your invoice number. You will receive an emailed copy of your payment. We are happy to offer this time saving option!

We very much look forward to working together with you and appreciate you, our client! And as always, we are here for your Financial Planning needs as well. Thank you!

Dave

— Dave Hainsworth, C.P.A. —

Finn's Follies



Finn checking in here with you. I know you all are busy gathering up your tax information for 2023-year end. What a better time to do so when it's cold and dark outside. My naps seem longer during the winter. Please remember to stop by and say hello to your best furry friend when bringing in those organizers. If you plan on meeting in the conference room, I can arrange to warm your feet this winter, I love sitting in on Dad's meetings! Until we see you, have a warm winter snuggled up to the fire.

Wags,
Finn



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