

Final Actions Required for Tax Return Completion

Dear Client,

The following instructions are a guide for completing the final actions required to file your income tax returns.

Items to be returned to our office prior to electronically filing your income tax returns

- **Federal Form 8879** – this form needs to be signed and dated by both you and your spouse (if filing jointly)
- **Client engagement letter** – this letter needs to be signed and dated by one individual shown on the returns
- **Invoice for our services** – Payment for service is due before we electronically file your income tax returns
Payment of your invoice may be made with check or credit card by calling: (513) 234-0977 or by visiting our website www.hurstkelly.com

Options to return your signed Federal Form 8879 & Engagement Letter to Hurst, Kelly and Company, LLC

- Mail using the pre-addressed envelope enclosed
- Drop off to our office in person to our receptionist
- Deposit in our secure drop box located outside our office front door at your convenience.
- Scan to PDF and email: documents@hurstkelly.com (please include "8879" in the subject line)
- Fax to (513) 672-9307

All tax payments and paper filed returns must be postmarked by Monday, April 15th, 2024

Items in your tax packet include personal summary sheets with filing instructions

1. Read summary sheet instructions for filing requirements
2. Make checks payable to taxing agency listed on the front of payment voucher(s)
3. Mail payment voucher(s) and check to taxing agency using pre-addressed envelope

City Tax Returns (If applicable)

City tax returns must be paper filed. Included in your city filing:

- Full paper filing copy of city tax return flagged where signature(s) and date are required
- Estimated /quarterly payment vouchers with envelopes, if applicable
- Copy of federal tax return and federal extension, if applicable
- Copy of income sources

1. Do not remove any documentation other than personal summary sheet
2. *Sign and date the return where flagged*
3. *If you have a balance due, include your payment*
4. *Mail tax return (and payment, if any) directly to the taxing agency using pre-addressed envelope*

Finally, if you have not requested a digital copy of your tax returns, a bound hard copy with your original documents has been included. This bound copy is for your personal records.

Feel free to call our office with any questions or concerns at 513-234-0977, or email us at info@hurstkelly.com. We are happy to assist in any way possible.

Thank you for choosing Hurst, Kelly and Company, LLC to prepare your income tax returns. We appreciate your business and look forward to serving you next year.