

Tax Year 2023 Information

2023 Tax Year Client Organizer – Review all pages of organizer and update information as applicable. Verify accuracy of cell phone number(s) and email address(es) on **page 1** for taxpayer and spouse. Review and answer questions on **page 4**.

Add notes on the last page of the organizer, or include a separate note, to indicate **significant life changes** that may have occurred during the year (e.g., marriage, divorce, moving, having a child, etc.) – when in doubt, add a note and we will reach out with follow up questions.

IMPORTANT DATES!

Submit your tax documents as early in the tax season as possible. Most tax returns where **complete information** has been submitted to our office by **March 15th** will be completed by the **April 15th** due date. Tax packets received near (and after) **March 15th** may need to be extended. If you are waiting on a "late" document, and the March 15th deadline is approaching, submit your documents with a note letting us know you are waiting for additional information.

Choose any option below to submit your tax information.

- Mail to our office using the envelope enclosed with your organizer packet.
- Drop off in person, ([check website for office hours](#)) or deposit into our secure drop box located outside our office door.
No need to verify your documents have been received.
- Scan and upload your tax documents to our secure portal, SmartVault at: <https://hurstkelly.smartvault.com>
Once completed, email info@hurstkelly.com to verify receipt. First time users, please email [Stephanie Wilms](mailto:StephanieWilms@hurstkelly.com) at stephaniewilms@hurstkelly.com to set up your account.

Please Provide the Following

Invalid/Expired ID information will cause processing delays and may even result in returns being rejected.

	Taxpayer	Spouse (if any)	Direct Deposit Info
License/ID - Full Name	_____	_____	
License/ID - Issuing State	_____	_____	Bank _____
License/ID - Number	_____	_____	Routing _____
License/ID - Issue Date	_____	_____	
License/ID - Ex.p. Date	_____	_____	Account _____

To update your driver's license or direct deposit information using our online form, [click here](#).

Extending your Tax Return

Go to the Current Client Document Hub on our website at www.hurstkelly.com or email info@hurstkelly.com for assistance.

- Individual tax returns (Form 1040): Contact us by **April 8th 2024**
- Business tax returns (Forms 1065 and 1120S) for Dec. 31, 2023 year-ends: Contact us by **March 8, 2024**

2023 HSA Account - Include Form 1099-SA. If you have not received your form, log into your online account and print.

2023 College or University Tuition and Expenses - Include Form 1098-T. Generally, Form 1098-T is not mailed. Log into your online account and print. List other educational expenses separately with a summary of the total amount paid.

To track college - post secondary education expenses using our downloadable form, [click here](#).