



S. J. & J. Inc.
Tax Preparation & Bookkeeping Services

Leah's 2023 Tax Season Letter

Welcome to Tax Season

I hope you all who are reading this letter are happy and healthy!

Before I start my traditional informational letter, I want to take the time to express my sincere thanks and appreciation you all have shown me and my staff in the last year. My world got turned upside down because of the flooding and destruction of our office that occurred February 5, 2023, because of a burst sprinkler system. It took 327 days to get back into our office. We are back as of December 29, 2023. We are getting ready for tax season just like we do every year. Last year, you showed Greg, Nenita, Linda, Katia, and me such grace and understanding I am truly humbled and grateful for it.

For those who had to come to my home to have your taxes prepared thank you for sticking with me and my unconventional way of preparing your taxes last season. I have gotten to be a part of your world preparing your taxes and seeing your personal side and now you have got to see my personal space. Seeing where a person calls home just hits differently in certain aspects. Doesn't it? I can't wait for you to see my improved office. Yes, I do have a sign wall it's just smaller.

For Greg's clients who were in my basement doing taxes, his office now at work has better lighting and you are not subjected to my uneven stairs heading downstairs. He has a professional space now versus my lived in home.

For Nenita's clients who were in the purple bedroom, her new office does not have a bed in it nor is it close to the bathroom. She now has a lot more space and you are going to be more comfortable.

For the clients who went to the temporary office, thank you for not complaining about our 400 square feet space and the amount of heat the room produced and where sweat was forming the minute you walked into an office. The flight of stairs you had to climb because you didn't know there was an elevator. We are safely back on the 1st floor and just a short walk to the building's front door. I am excited to show you the remodeled office. Yes, you need a key still to use the bathroom.

We have added a new person to the office who will be working the front office with Linda and Katia. Please welcome Kelsey... Kelsey has been with us since November.

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Now on to the 2023 information you need to know...

The information that you should be aware of when preparing for your 2023 taxes. I will be explaining everything below because you need to be aware of the new rules and regulations.

- S. J. & J. Inc. has a Facebook page where I will be updated with important information. The link is: <https://www.facebook.com/groups/239305520600/>.
- The Required Minimum Distribution (RMD) age is now 72 years old.
- If you are giving or receiving Alimony, we do need the actual Date of the Divorce.
- Appointment reminder text messages and emails were sent in November and December. I am sorry if all the spots were filled, it is on a first come first serve basis.
- The Internal Revenue Service **DOES NOT** call you unless you have received a letter in the mail and then they usually still will not call you. The IRS does not email either. These calls and emails are scams. DO NOT GIVE THEM ANY INFORMATION!!!
- To get the Higher Education Credit (College Credit) please bring in the amount you paid to the school and the 1098T. Every student who enrolled in college gets one so ask your child for it. This can also be found on the Student's Portal for College.
- The gift amount for 2023 is \$17,000. However, in 2024 it increases to \$18,000.00.
- The 401K contribution is \$22,500 not including the step-up basis (\$30,000). The Simple Contribution is \$15,500 including the step-up basis totaling \$19,000. The Traditional IRA and Roth IRA contribution is \$7,000. The step-up contribution is \$8,000.
- Bring your Settlement Sheets if you bought, sold, or refinanced your home or rental property.
- If you bought an Electric Vehicle you need to bring your purchase paperwork with you because it contains information, we need to get you the credits to which you are entitled.

Now that I got those bullet points out of the way; I can go into repeat mode and say some vital information that I wrote on the checklist. **Payment is expected and required at the time of the appointment.** Billing is not an option. The tax return will not be released from our office or e-filed until the payment is collected. Bounced checks will be charged a bank service fee. S. J. & J. Inc. is accepting Debit Cards, Credit Cards, Checks and Cash is still accepted.

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There will be a fee increase this year.

As for your Child that is no longer your dependent; I hate to tell you this, but someone should. PLEASE let them grow up and start to take responsibility for themselves. It is time for them to make their own appointments. A good rule of thumb to follow is if you do not support them and they make their own money it is time to let them go... If you have my office prepare your Adult Child's taxes they will be charged.

The office is closed every other Sunday (February 11th, February 25th, March 10th, March 24th, March 31st, and April 7th) so please plan accordingly. Tax Season Hours are Monday - Friday 9am to 8:30pm. Saturday 9am - 2pm and Sunday (every other) 12pm - 5pm. Non-Tax Season Hours are Monday - Thursday 9am - 5pm.

I genuinely want to thank each one of you who is reading this letter for your continued patronage, support, and trust that you have given me and my staff. I am truly humbled and proud to be able to do what I love for you every year.

Anyone can prepare a tax return but not everyone does it right. You pay S. J.& J. Inc. for our knowledge, experience, and skills.

With Appreciation,
Leah
Leah B. Greenberg