



WOJESKI & COMPANY

Certified Public Accountants

159 Wolf Road, Albany, New York 12205 | phone (518) 477-1102 | fax (518) 477-1302

www.wojeskico.com | admin@wojeskico.com

Welcome 2023!!!

Hard to believe, but it is once again time to start gathering all of your tax documents and related information to deliver to your Wojeski tax professionals! For your well-being and for the safety of our Wojeski team, we kindly ask that you either mail your tax information to us or submit it electronically (the preferred Wojeski method) instead of dropping it off at our Wolf Road office. If you still wish to drop off your tax information, you may leave it in the designated spot in our reception area during regular business hours (Monday through Friday, 8:30am to 5:30pm) – *HOWEVER*, please be aware that any in-person meetings with Wojeski staff, including dropping off your information, should be scheduled in advance and is subject to compliance with active state regulations and Firm policies at any given time.

A few items to help with the process of preparing your 2022 tax return:

- The Wojeski team would appreciate receiving your tax information as early as possible. If you have the majority of your information, but are still waiting for one or two pieces, please remit what you have as soon as you can – this will allow us to begin your return before the cutoff date. If we do not receive your information in our office by **Wednesday, March 1, 2023**, we cannot guarantee that we will be able to complete your tax return on time and additional fees may apply.
- Due to increased compliance obligations on financial institutions, IRS 1099 forms – which are needed to prepare tax returns – now have a later release date; with some 1099's often not being released until mid-March. This, unfortunately, has led to continually increasing work compression in a one-month period (between March 15th and April 15th) for your Wojeski tax professionals. As a result, if final information to complete your tax return is received after March 15th, an extension may still be necessary even if initial information was received prior to March 1, 2023.
- Initial tax information received after April 1st will prompt an automatic extension of your tax return and additional fees may apply.
- If your NYS driver's license expired or has been replaced for any reason in 2022, we will need a copy (front and back) of your new license.
- If you would like direct deposit of refunds or withdrawal of taxes due, please provide us with a copy of a voided check. If you are currently set up for direct deposit or withdrawal and your bank information changed in 2022, be sure to provide us with the new information.
- Please also advise us if you have any foreign bank accounts and/or cryptocurrency transactions.

If you have any questions, please feel free to contact our office and, as always, **thank you for your business!!!**

Wojeski & Company