

## Our Calendar is Open!

Go to [pelandassociates.com](http://pelandassociates.com) to schedule your tax appointment as soon as possible. This system will allow you to select the date, time, and type of appointment that is most convenient for you. It will also provide you with notifications and appointment reminders via email and/or text. *You may reschedule your appointment up to ten days prior to your scheduled time.*

If you have trouble with the website or have any questions, please call our office for assistance.

## Need-To-Know About Scheduling!!

**Appointments & Waitlist:** Based on prior years, we know our schedule WILL fill up quickly. If you contact us and appointments are full, we can add you to a waitlist to fit you into any appointments that opens up. This is NOT a guarantee of an appointment and we may still discuss filing an extension.

**Document Requirements:** All documents are required to be submitted one week prior to your phone or Zoom appointment. If your documents are late or do not include our office documents\*, your appointment will be canceled and rescheduled (subject to appointment availability) and a \$50 fee will be added to your tax preparation bill.

**Extension:** These appointments will begin in May. For all clients who go on extension, there is an agreement to sign and a deposit of \$25 (This is not an additional fee.) An extension is an extension to file, NOT an extension to pay.

**Cancel/Reschedule Appointments:** We ask that you schedule your appointment carefully. If you do change your appointment less than ten days prior to your appointment, you will be charged a \$50 fee.

*\*Required office documents are: Tax Organizer, Engagement Letter, & Tax Questionnaire. Copies of these documents are included with this newsletter. If we do not receive these documents one week prior to your appointment, it will be canceled.*

## 2023 Tax Season Appointment Options

*Our schedule fills fast! There are no reserved appointments except for our Pilgrim Place (a retirement community) appointments described below.*

In-Person Appointments in Cypress with Kari Pel, EA & CFP®	Zoom Appointments with Kari Pel, EA & CFP®	Phone Appointments with Kari Pel, EA & CFP®	Appointments with Dr. Paul R McReynolds, EA
Except for the Pilgrim Place appointments described below, our in-person appointments will be held in our beautiful Cypress office. If possible, it can be helpful if we receive your information <u>one week prior to your scheduled time</u> .	If you want to see a face without the drive to Cypress, we have appointments available by Zoom. These appointments are 30 minutes long. Please note information <u>MUST</u> be received <u>one week prior to your scheduled time</u> .	30 minute phone appointments are also very effective. Kari will call you at the time of your appointment. Please note information <u>MUST</u> be received <u>one week prior to your scheduled time</u> .	If you normally work with Dr. Paul, <b>the process has changed slightly</b> . He will still call to discuss your return over the phone, but you can now schedule the time of the call by visiting our website.

### To Pilgrim Place Residents:

Your in-person appointment with Kari has been prescheduled. Please contact us to confirm or reschedule this appointment time.

**Your appointment time:**

# Pel & Associates Team:



## ***IT Manager & Office Assistant***

Emily Galvan

## ***Owner & Tax Preparer***

Kari Pel, EA &  
CFP®

## ***Office Manager***

Sabine Galvan

## ***Founder & Tax Preparer***

Dr. Paul  
McReynolds, EA

### **Our Process**

HOW OUR TEAM IS WORKING HARD FOR YOU!



#### **1. APPOINTMENT MADE**

You schedule an appointment for your preferred date and time!



#### **2. DOCUMENTS COLLECTED**

You send us your documents via uploading, faxing, or mailing. Our office team receives the documents and alerts the preparer.



#### **3. DATA ENTERED**

Information is entered into our tax software. Admin staff may also reach out to you for clarification prior to your meeting with Dr. Paul or Kari.



#### **4. INFO REVIEWED**

A week prior to your appointment, your information will be reviewed. This allows Dr. Paul or Kari to be prepared for your meeting, and to insure that the appointment is as effective as possible.



#### **5. RETURN PREPARED**

After Dr. Paul and Kari have completed the expert preparation, the Admin Team will facilitate uploading or mailing the prepared documents to you. They will also aid in receiving e-file authorizations and e-filing your return after you have had opportunity to review it.

## **TAX TIPS**

- Please add up all receipts and provide a total with your documents **BEFORE** your appointment.
- **Organizer Tips:** If you would like to receive a more detailed organizer that lists last year's information alongside space to enter in this year's information, please call or email the office. We will get one out to you right away.
- **DMV Fees:** Remember, only the license fee, based on the value of the vehicle, is deductible on your tax return. For California vehicles, the deductible portion is listed on the bill as "License Fee" with the verbiage, "This may be a tax deduction" next to it. Please have this information available at your tax appointment. You can also check out the DMV website at [www.dmv.ca.gov](http://www.dmv.ca.gov) for more information.
- **Check W-2's and 1099's:** Please check for accuracy **BEFORE** your appointment.
- **Medicare Premiums:** In the medical section of the Tax Organizer, please indicate whether you have included your Medicare premiums as part of your insurance premiums. We want to make sure we are not duplicating this information as it is also reported on your Social Security Statement (Form 1099-SSA).
- **State Estimated Payment:** If you had a large increase in income during 2024, it might be wise to make your state tax payment before December 31, 2024. The amount may be deductible on your federal return as an itemized deduction. (Sorry, the federal tax payments are not deductible on the state return). To verify that a pre-payment of State income tax would be of benefit to you or if you have any questions, please call the office.
- **SPECIAL NOTE FOR MINISTERS:** Establishing your 2025 Housing allowance. Remember, your housing allowance should be established each year and in advance. This firm recommends that you establish your 2025 housing allowance in December.

## **May you have a joyful Christmas & a Happy New Year!**

Mail: P.O. Box 400, Los Alamitos, CA 90720  
Fax: 866-279-4916

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