



George S Magas CPA PC, Magas Advisory Group  
Phone 301.253.0013 Fax 240.465.0201

January 8, 2023

Dear Client,

We are celebrating our 34th year in business and can't thank you enough for your continued confidence and support. Again, the 2023 tax year will bring many new challenges and some changes we have never faced before. Please have extra patience should we take a little longer in preparing your return.

**To assist in making us more efficient, please take note of the following:**

- Visit our website for answers to many questions [www.magascpa.com](http://www.magascpa.com)
- Email Cathy ([cathy@magascpa.com](mailto:cathy@magascpa.com)) to schedule appointments, to get answers not available on the website, and for any billing questions.
- Consult George prior to any decisions regarding Social Security, retirement income planning, incorporating, rolling over retirement funds and investments.
- Email Kyle ([kyle@magascpa.com](mailto:kyle@magascpa.com)) or Marc ([marc@magascpa.com](mailto:marc@magascpa.com)) with tax and/or payroll questions, with additional tax information to be added , with any tax questions, and to request an organizer.
- Consider uploading your information to our secure portal (SmartVault).. Instructions can be found on our website. Please call Cameron if you have any questions or access issues.
- All tax documents should be opened and given to us outside of envelopes
- Documents should be in given in the same order as the tax organizer
- Double check that you have provided us with all info needed
- Please wait for us to contact you with questions or notice of completion.

The filing deadline for the 2023 tax year is Monday, **April 15, 2024**. We will need all info by March 22, 2024 in order to prepare your return on time. As a designated "paid preparer", I must be paid before I can electronically file.

For those of you who would like to request a meeting, please let us know if you would prefer an in-person or virtual meeting. Please call 301-253-0013 or email [cathy@magascpa.com](mailto:cathy@magascpa.com) to schedule the meeting as soon as possible. There will be an additional fee for all meetings.

Websites: [magascpa.com](http://magascpa.com) or [magasadvisorygroup.com](http://magasadvisorygroup.com)



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Outside of appointment fees, our fees will be based on:

- Organization
- Number of Forms
- Complexity
- Extra time spent on collecting additional information

Extensions are completed by written request and with a payment of \$65.00. PDF copies of past tax returns have a charge of \$30.00. As a reminder, all previous tax returns are uploaded on clients Smart Vault portals.

**We remind you that tax planning should be addressed throughout the year as an integral part of retirement planning. As always, we encourage you to contact us to discuss how these issues impact your tax position, as well as your retirement.**

**Please visit our financial planning website, [magasadvisorygroup.com](http://magasadvisorygroup.com), to find out more about investments, tax planning, and retirement planning.**

We look forward to working with you again this year and wish you a happy, healthy, and prosperous 2024!!

Sincerely,

A handwritten signature in black ink that reads 'George S. Magas'.

George S Magas CPA

Here to help you in 2024..... George, Cathy, Marc, Kyle, Cameron, Adriana, Isabella, and Jennifer

Websites: [magascpa.com](http://magascpa.com) or [magasadvisorygroup.com](http://magasadvisorygroup.com)