

WELCOME TO THE 2023 TAX SEASON

Our office hours for the tax season will be:

January: Monday - Friday 8:00 A.M. - 5:00 P.M.

February - April 15th: Monday - Friday 8:00 A.M. - 6:00 P.M.

Saturday 8:00 A.M. - 12:00 P.M.

Check out our website: www.bengardassociates.com. We offer several services, financial tools, and forms. We have added a "FILE SHARING" tab for your convenience. You may upload documents and communicate with any of our associates or employees through this method.

Organizing personal documents: When gathering personal documents, please wait until you have received all of your documents before dropping them off or uploading to the portal for your taxes to be prepared.

Update/confirm address & phone: Please take the time to verify that we have your correct address, email address, and phone number on your client organizer.

Bank Account Information: If you are planning to have funds directly withdrawn or deposited, please make sure that you have the correct bank account information along to verify that we have it correct. Once your tax return has been filed, this information cannot be changed.

Getting information to your accountant: There are several methods to get your information to your accountant once you have it all prepared.

1) Drop off: During office hours you may bring your documents into the office. If you are not comfortable coming into the office, there is a drop off location in the entryway.

2) Drop box: A locked drop box will be available on the southeast corner of the building by the employee entrance. The box will be available to clients that need to drop off documents during non-business hours. The box is checked first thing in the morning and periodically throughout the day.

3) File Sharing Tab: On the bengardassociates.com website there is a tab that you may upload documents.

4) Email: You may use the email: admin@bengardassociates.com

5) Mail to: PO Box 377, Orange City, IA 51041

6) Portal: A free and secure web-based portal that will allow you to upload your tax return information.

Request of information: With the use of the portal, you will be able to forward information to banks, or to anyone that requests your information. If you choose to opt out of using the portal, please allow additional time for us to get your information sent out to banks, etc. on your behalf during the tax season.

Pay online: You will have the option to pay for your Bengard & Associates, Inc. tax return preparation online through your portal.

E-signature: We will once again offer the option to e-sign your tax return.

Refund status: Please refer to our webpage for the Federal and State links to check the status of your refunds. Another good resource to check for your refunds is irs.gov and tax.iowa.gov.

Certified payments: Due to new regulations, any tax payments that Bengard and Associates, Inc mails on behalf of a client will need to be sent by certified mail. The charge will be a flat fee of \$20.00.

1099/W-2 Forms: All 1099 and W-2 documents need to be postmarked by January 31st. Anything mailed out after that date has the possibility of receiving a late fee by the IRS. Please make sure to get your information in to us by January 15th to insure that your 1099s and W-2s are mailed by January 31st.

Thank you for the opportunity to serve you. We appreciate your business.

Bengard & Associates, Inc.