



# KENNEY TAX & ACCOUNTING, LLC

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Dear Clients,

Happy New Year!! You have made it through another year and thus begins the task of collecting your tax data for the new filing season.

**It is very important that you carefully read this letter. All the forms listed below must be completed, signed, and brought to your tax appointment. If you have any questions on any of the material you find here, be sure to contact our office.**



## SCHEDULE YOUR APPOINTMENT ONLINE!

We continue to offer you the opportunity to book your tax appointment online. This feature allows you to quickly book your appointment for a date and time that is convenient for you. Please visit our website at [www.kenneytax.com](http://www.kenneytax.com) and click on the **Book Now** icon (*on the right sidebar of our website*) to begin the process.

You will find the following letters and forms on our website at [www.kenneytax.com/client-tax-packet/](http://www.kenneytax.com/client-tax-packet/):

1. Year-End-Client Newsletter
  - a. Contains important information regarding Federal tax extender bills, MN adoption of many of the Federal Tax changes and tax planning tips.
2. 2023 Engagement Letter
  - a. Read the letter completely – then sign and date page 4 (both spouses must sign)
  - b. **The entire letter must be returned to us.**
  - c. Be sure to keep a copy for your records.
3. 2023 Questionnaire
  - a. **The 2023 Questionnaire sheet must be completely filled out and returned to us.**
  - b. Both spouses must sign and date the questionnaire (*if applicable*)
  - c. If you received a personalized organizer, the questionnaire is included in it.

4. 2023 Tax Organizer (Blank), (Fillable) or (Personalized - found in your secure portal)
  - a. Provided to assist you in gathering your tax documents.
  - b. 2023 Tax Organizer (Blank) can be printed out and filled in with a pen by hand.
  - c. 2023 Tax organizer (Fillable) can be opened with Adobe Reader and filled in on the screen.
  - d. A personalized tax organizer can be found in your secure portal if you were a client last year and have already completed the secure portal setup process (if you are unsure if you have a portal -please contact us).
  - e. **This form is optional.**
  
5. **Required Documents (If we don't already have on file)**
  - a. Driver's license or other Government issued ID for all persons listed on your return.
  - b. Social Security cards for all persons listed on your return (*If we don't already have on file*)

Thank you for your time and patience. We look forward to seeing you soon!

Sincerely,

*Christina Kenney, E.A.*