



2022 Tax Organizers and Tax Season Preparation

Video: Tax Organizer Explained - [CLICK HERE](#)



This video will answer the questions below regarding the status of your Tax Organizer, along with current changes, explanations and expectations.

- When will I get my Tax Organizer?
- Do I need to sign the tax return engagement letter in the Organizer and answer the questions in the Organizer? ***No tax return will be filed without these questions being answered.***
- Do I need to fill everything out or can I just send my documents?
- Can I mail information? ***Yes, but we strongly encourage and prefer scanned and emailed/uploaded documents, not pictures***
- What is the IRS looking for this year?

Please continue to stay tuned for more videos and newsletters to come.

Stay safe and healthy,

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