ROSEN & ASSOCIATES, LLP
CPAs | Specializing in the Business of Dentistry

ADCPA
ACADEMY OF DENTAL CPAs
Setting the Standard Since 2001

VIEW OUR SERVICES 508-926-2400

Helpful Reminders & 1099's

We would like to remind you of important tasks that aid us in updating your financial records. If you have any questions, please reach out to your Rosen contact.

Fringe Benefits - www.rosendentalcpa.com/fringe-benefit/

Your W-2, if applicable, must include information about owner heath insurance and personal use of your auto. In order to calculate this data, we need every business owner that pays their health insurance through the practice or uses a business car personally, to fill out the form on our website above.

- This form must be completed by November 30, 2023 in order to be submitted to the payroll company on time.
- After the information is submitted, your Rosen account manager will communicate the necessary information that you will need to forward to your payroll company before the end of the year.

1099 Preparation

Be sure you have updated and completed W-9 forms for all independent contractors (consultants, repairmen, attorneys, cleaning companies, etc). You are required to issue a 1099 to all unincorporated service providers that receive $600 or more in 2023, unless they were paid by credit card.

- IRS instructions citing the 1099 rules & instructions - https://www.irs.gov/pub/irs-pdf/i1099mec.pdf
- W-9 form and instructions - https://www.irs.gov/pub/irs-pdf/fw9.pdf

Rosen Helpful Thoughts - www.rosendentalcpa.com

- The most secure and preferred method of transmitting documents to Rosen is electronically, through your account manager's email link or the upload documents link on our website. The link is located on the top right corner where it says "Click here to upload files". Choose your account manager from the drop down list (or admin if you are not sure who to send it to). Enter your email address, name, and add as many files as you want in one submission.
- If you need copies of your tax returns you can access them through your Sharefile portal on our website. On the top right

corner click "Secure login to view tax returns", enter your email address and password. If you do not remember the password you can click forgot password.

- Our staff works in a hybrid environment, please contact your account manager prior to making a trip to our office to drop off documents.
- Please be sure to send bank and credit card information to your account manager monthly. This allows us to manage the work in a better time-frame and be able to complete your work faster.
- Increased security on bank and credit card websites require verification codes before Rosen staff can access your statements. If you haven't already, please set up your account manager with their own access by contacting your local bank branch manager or setup a dedicated day once a month to relay access codes to your account manager.

ROSEN & ASSOCIATES, LLP

Our Services **The Rosen Family** **Contact Us**

ROSEN & ASSOCIATES, LLP
CPAs | Specializing in the Business of Dentistry

1800 West Park Drive, Suite 300, Westborough, MA 01581
phone: **508-926-2400** • fax: 508-986-9439
info@rosencpagroup.com