



Happy New Year & Welcome Back

As we approach a new tax season, consider submitting your documents early and online. Remember you can file your tax return remotely using the Client Portal or in-person at our office. To schedule an in-person appointment, call the office and we'll be happy to assist you.

– Lorie will be in town until end of April this year, so if you would like an in-person appointment, please keep that in mind.

WHAT'S NEW THIS YEAR

Document Submission Deadline

In order to file your tax return in a timely manner, we ask that you submit all documents no later than the dates below. If you have any questions, please contact our office. For an extension, you **MUST** contact the office for us to file it for you.

- **Corporate Reports - February 15th, 2024 (Partnerships, LLCs and S-Corps)**
- **Personal Tax Documents & C-Corps - March 18th, 2024**

– **Insurance Form 1095A** is required if you had health insurance through Covered California at any time during the year 2023

Client Portal

When providing your documents via the Client Portal, please name each file and be sure the files open correctly and are not encrypted prior to uploading. (Accepted Format: PDF). Due to increased spam emails, our office will not accept documents via email. If you've uploaded your documents successfully, we will send you a confirmation email that we have received your file. Once we have reviewed your documents, and if we need additional information, we will follow-up via email. Click here for a step by step guide for using the Client Portal, or visit our website www.quiktaxservices.com for more information.

Phone: 714-744-4077
Fax 714-744-2568
Email: info@quiktaxservices.com
Contact Request: Quiktax Service Inc

Fraud Alert

IRS will never call you directly, but they will send you a notice via US Mail. If you receive such a notice and require assistance, please email our office about the notice and upload your documents to the Client Portal. We'll review your document and contact you via email if needed.

Mailing or Dropping Off Tax Documents

Before submitting your documents, confirm you have collected all necessary paperwork for the filing year. When providing us with your documents, please provide copies only. Keep your original documents for your records. All documents provided to us must be labeled and placed in a sealed envelope. Before sending your documents to our office, make sure to open envelopes, and include only documents pertaining to your tax filing year. Envelopes may be put through the mail slot

Estimated IRS Payments

Did you make payments to IRS? We will need to know exactly how much you paid and payment dates.

Did Something Change?

If your information has changed (retirement, births, deaths, official name change, property refinance, purchase or sales, stocks or related other questions), please upload documents to our Client Portal. We'll review your changes and follow-up with you if needed.

Filing Your Return on Time

Finishing your submission in a timely manner is our number one priority. Only complete submissions are prepared in the order that they are received. Upon review, we will request any missing information via email. Not receiving requested information in a timely manner could cause your return to be delayed

Remote Tax Return Finalizations

When your tax return is ready, we will call you to schedule a telephone finalization appointment. We will have you sign documents electronically, and once you sign, you can download your copy immediately.

Our Policy: Cancellation of telephone or office appointments with less than 24 hrs notice will be charged \$75.00. Rush fee (within 72 hours of due date) will be charged \$250.

Payments of Service: Payment for tax return is due at time of finalization. Tax returns will not be filed with IRS unless payment is received. We accept cash, checks, Venmo & major credit cards (4% convenience fee). Checks need to be dropped off or sent certified as our mail service tends to be unreliable.

Referrals: Thank you for continuing to help our business grow! We welcome all referrals. Please share a positive experience with your friends and family. Click the link to our YELP page or picture below to leave a review

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