

**The enclosed checklist is not required, it's only to help jog your memory, so don't stress about it.**

(A detailed personalized list is available by request.)

**Personal Information Needed:**

- Earned income (W-2s, 1099-Misc, 1099-NEC, Unreported Income)
- Interest/Dividend/Stock Trades (1099-INT, -DIV, -B)
- 1098 from mortgage company for interest/property tax on your home.
- Sch A deductions (Property Tax, Home Interest, Charity, Medical) if more than \$12,950 single/ \$25,900 married
- Major Purchases (New Home, Vehicle)

**Small Business Information Needed:**

- 1099's received from employers.
- Copy of W-2s or 1099s you sent out to your employees or contract laborers.
- Your calculations of total income.
- Your business expenses – broken out the same as last year (or call for guidance).
- These can be provided as paper logs, Excel worksheets, or a Quickbooks file.

**CORPORATE, LLC AND  
PARTNERSHIP RETURNS ARE DUE  
MARCH 15<sup>TH</sup>!!**

## TAX RETURNS ARE DUE 4/17/2023

You can call to make an appointment,  
mail in your information,  
or upload to the portal.

ESTIMATED PREPARATION TIME

(If provided by, based off volume)

February – 2 weeks  
March Week 1 – 3 weeks  
March Week 2 – 1-2 months  
March Weeks 3/4 – 2-3 months  
April – 4+ months

**We will always call you to discuss  
your tax return before we finish it  
and we will always supply you a form  
for your signature and a copy for  
your file.**

We don't open your envelope until it  
comes up in the rotation. If there is an  
urgent message enclosed, call and let us  
know to open it when we receive it.

Anything received after March 3<sup>rd</sup> will  
probably be extended.

Call (512-259-4404) if you need an  
extension, there is no charge for this  
service.

## BRATTON FAMILY TAX AND BOOKKEEPING SERVICES INC

**Chris Bratton, EA**

**Barbara Bratton, CPA**

**Tamara Haas, Office Mgr**

Mailing Address

PO BOX 2242  
Leander, TX 78646

Office: (512)259-4404

Fax: (512)259-0392

brattonbiz@gmail.com

PHYSICAL ADDRESS\*:

**CALL FOR  
CONFIRMATION**

**Payment is due upon completion.**

**Rapid Refund Loans are not available.**  
There is no additional charge for electronic filing.

## CHANGES FOR 2023

- Did you buy any Energy Star Appliances?
- Did you make any Energy Star upgrades to your home?
- Did you buy an electric or hybrid vehicle?

## GENERAL REMINDERS

- Expenses are still allowed on Sch C Self Employment and Sch E rental properties.
- If you feel your deductions will be more than \$12,950 (\$25,900 Married) then send:
  - a. Home Mortgage 1098
  - b. Medical Out-Of-Pocket Costs.
  - c. Sales Tax from Vehicle Purchase.
  - d. Charitable Contributions.
- Education Credit - If your child is in college, we need Form 1098-T to calculate the college credit.
- We need your Driver's License information if you renewed it in 2022.

As a reminder, you can no longer claim any expenses against W-2 income (i.e. mileage, home office, supplies, etc). These expenses are still allowed with 1099 income.

## BASIC RATES 2023

### **INDIVIDUALS:**

Basic Federal Return	\$300
(Includes Insurance and Postage)	
State returns	\$100 base
Amended returns	\$150 base
Add'l Schedules	
Complex (C,D,E,F)	\$50 base
Other Forms	\$10 base
Simple Return (W-2 only)	\$150

**We will do your minor child's return for free in order to coordinate them with your return.**

### **BUSINESS:**

Form 1065 Partnerships & LLC	\$500 base
Form 1120 & 1120S Corp	\$500 base
Form 990 Non-Profit	\$500 base
990-N (postcard)	\$100
Franchise Tax Report	\$50

*We reserve the right to adjust these prices up or down based on complexity.*

### **OTHER CHARGES:**

In office appointment	\$25
Bookkeeping	\$70/hour
Payroll Processing	\$70/hour
Payroll Reports	\$50/quarter

**Other tax issue resolution services (Audit, Offer in Compromise, Penalty Abatement, Etc.) offered by quote.**

## HELP WITH CRYPTO

If you are investing in Cryptocurrency, NFTs, or other Digital Assets and don't have a good transaction infrastructure, we can help you with a partnership with LukkaTax to organize your info and minimize your taxes.

## PORTAL UPGRADE

Hopefully most of you are aware of our Drake Portal system to pass files back and forth. They will release an app (available in both the Android and Apple stores) in 2023 to make it easier to use and manage. It is supposed to be available for tax season so you should be able to find it soon.

## REPORTING

### HEALTH INSURANCE

**If you received Health Insurance through the Marketplace, your 1095-A is still required to file your return.**

Other than that, it is no longer required.