



ROBERT CALZINI

CERTIFIED PUBLIC ACCOUNTANT

439 Lancaster Street
Leominster, MA 01453
978.534.1711
www.bcalcpa.com

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Dear Valued Client,

It is hard to believe we are approaching the end of another year. As we prepare for tax season, our goal is to ensure that you receive outstanding client service and have peace of mind knowing that we are giving 100% focus on improving productivity and effectiveness for the benefit of our clients.

We encourage you to use either our drop off, mail, e-fax, or secure web delivery portal to transfer your tax documents. We have a limited number of appointments available this year; appointments are available Tuesday morning from 9:00-1:00 and Thursday afternoon from 2:00-6:00. Call the office and Naomi will schedule this for you. Rest assured you will receive our utmost attention regardless of whether you have an appointment or not. To upload your information, visit our website, www.bcalcpa.com, and click on the client access tab to securely send your documents via our portal. When uploading your information make sure all fields are complete, and under the Company field, please enter "2023 tax information". Remember to include all W-2s, 1099s, health care forms, etc. along with information about your business if applicable.

Please note the following essential information:

- **The tax deadline is April 16, 2024, this year for individuals, Trusts and 1120 corporate Returns.**
- **March 15, 2024 if you have a separate corporate or partnership return (1120-S or 1065).**
- **Please let us know of any important life changes (birth, marriage, inheritance, etc.).**
- **As a reminder, payment is due on delivery of the tax returns.**

Please send in your information as soon as possible so that we have enough time to prepare the returns. To ensure completion by the filing deadline ALL information must be received by **Monday April 1, 2024**. If we receive your information after this date, we WILL need to file for an extension. If you are someone who normally goes on extension, please send Naomi an email (naomi@bcalcpa.com) with your request to be put on extension before the end of January 2024. **If you typically owe, please note that payment of the tax is due with the extension, failure to make the payment will make the extension invalid and result in interest and penalties.** Please upload your information with your request so the accurate amount to be paid with your extension can be calculated. This should include the banking information you would like to have the payment withdrawn from.

As in previous years, we will complete your tax return as quickly as possible after receiving all your information.

We thank you for the trust you have placed in us and look forward to a productive 2024!!

Very truly yours,

Robert Calzini, CPA