**Pasadena Tax Services TY 2023**   **It’s Still a NEW YEAR-2024**

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TAX PREPARATION KISS = KEEP IT SIMPLE SYSTEM

ACTIONS:

KEEP ALL TAX RELATED Papers & Down-Loads in ONE PLACE. Coming in Jan-Feb.

INCOME DOCS: W-2, 1099 MISC, 1099 INT, DIV, R & BANK RECORDS OF SELF -

EMPLOYMENT (SE) INCOME. Keep Organized for your Schedule C = Lower taxes.

EXPENSE DOCS: ALL BUSINESS EXENSES TOTALED by CATEGORY: See Schedule C!

CREDIT CARD (CC) YEAR-END - ASK them for it! OR MONTHLY STATEMENTS

BANK STATEMENT and/or PERSONAL LISTS. For Annual AUTO : Keep 3 MILEAGE RECORDS: Annual TOTAL, COMMUTE & S.E. BIZ TOTALS if self employed too.

LIST Auto TYPE, YEAR and START USE DATE OF EACH CAR per Job ie. 9/15/2022

IF YOU USUALLY OWE MONEY: PAY ESTIMATED or QUARTERLY INSTALLMENTS

PAY ALL by APRIL 15TH TO WWW. IRS.GOV & FTB.CA.GOV

They want your TAXES AS you EARN $$ – to avoid Penalties keep this in mind, please.

Electronic payments @ www.eftps.gov with credit card or bank draft to avoid CC fees.

Or MAIL voucher or your info page with check postmarked by 4/15 at the latest to

INTERNAL REVENUE SERVICE PO BOX 7122 SAN FRANCISCO, CA 94120- 7122

ALWAYS WRITE YOUR LAST 4 # OF SS# AND TAX YEAR THE PAYMENT IS FOR

ie. SS#1234 TY 2023 in the memo line of checks. Keep COPY for your & my records. And give details of payments made with your income and expense documents - $$? for TY23?

Keep it Simple with Paperless communications with ME and the IRS; keep the records online!

USE OUR PORTAL Systems: Ask for a Link in pasadenataxservices.com OR OLTpro.com

Also you can have me make A Payment WITH your EXTENSION! Remember those? Let me know How much $ and if Bank Acct Numbers are the same as 2022 TY by March 20. 2024.

ANY QUESTIONS CALL ME or EMAIL: [ABRIGHTRAY@GMAIL.COM](mailto:ABRIGHTRAY@GMAIL.COM)