

AMR Tax Services, Inc.

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www.amrtax.com
January 01, 2024

Dear Friends,

Thank you all so much for a successful tax season last year. Each year brings new growth and possibilities. This is another exciting year and we look forward to seeing you.

The 2023 tax year has fewer changes than any year since the Tax Cuts and Jobs Act of 2018. The Covid legislation (CARES and SECURE acts) has enacted many items we must account for when preparing a 2022 income tax return. These items will include the stimulus payments. **The Affordable Care Act Individual Mandate is NOT in effect.** Beginning with 2019 tax, the penalty is removed. Those who purchase from the exchange will receive form 1095-A.

IF YOU PURCHASED HEALTH INSURANCE FROM THE MARKETPLACE, WE MUST HAVE YOUR 1095-A OR WE CANNOT FINISH YOUR RETURN.

The word from IRS is tax filing will begin on January 29, 2024. We sure hope so...We believe with all the changes this year, significant delays in processing are bound to happen. In addition.....IRS is conducting extensive identity theft checks this year. We believe this will result in further delays in processing. **If you've received an Identity PIN from IRS, be sure to bring it with you.**

We (AMR) have many additional compliance requirements and may need to make additional copies of your records. We will need to make a copy of your ID. Be sure to bring a copy of your spouse's ID if they are not coming to the appointment. If you have a new child for 2023, please bring a copy of the birth certificate and SS card. Please help us by taking the time to fill out a worksheet.

We have online booking available through our website. For those we served last year, you are already registered. You can log in using your last name as the user name and your house number as the password or you may use the user name and password you have created. When you book online you will receive a confirmation e-mail and a reminder the day before your appointment. Please refer your friends to our web site: www.amrtax.com.

AMR Tax Services, Inc. is an Authorized E File Provider and we are **REQUIRED** to E-File all our returns. Please be sure to verify the names and social security numbers on your return. The IRS verifies these on all returns. If these items are wrong, there could be a delay in the amount of time it takes you to receive your refund. **EARNED INCOME CREDIT, CHILD TAX CREDIT, AND COLLEGE CREDITS RECIPIENTS SHOULD BE AWARE THE IRS IS EXPANDING THE VERIFICATION CHECKS. THIS COULD RESULT IN A DELAY IN PROCESSING ANY REFUND EXPECTED.** If you owe any amounts to the IRS or Oklahoma Tax Commission, you have until April 17, 2023 to pay even though your return has already been filed.

Respectfully,



Adam The Taxman EA
President



Roxanne Zardo CPA
Accounting Director

DEPENDENTS

Name	SS#	Relationship	Birth-date	College Tuition

List **INTEREST** and/or **DIVIDEND** income by source and amount (Please Bring The 1099 Forms):

_____ \$ _____ \$ _____ \$ _____

List **Other Income:** _____ \$ _____

List **UNEMPLOYMENT COMPENSATION RECEIVED**.....Husband or Single \$ _____ Wife..... \$ _____

List **SOCIAL SECURITY BENEFITS RECEIVED**..... Husband or Single \$ _____ Wife.....\$ _____

List amounts **contributed** to **IRA ACCOUNTS**..... Husband or Single \$ _____ Wife.....\$ _____

Circle **IRA Type**.....**ROTH** **Traditional**

Check Box if you **Itemized Your Deductions** last year.....

Student Loan Interest Paid.....\$ _____

MEDICAL EXPENSES: Please **DO NOT** include amounts paid by **PRE-TAX PAYROLL DEDUCTION**. (Cafeteria Plan)

PRESCRIPTION DRUGS \$ _____ HOSPITALIZATION INS. \$ _____ DENTAL \$ _____
EYE GLASSES..... \$ _____ HOSPITALS \$ _____ DR. _____ \$ _____
MISCELLANEOUS..... \$ _____ DR. _____ \$ _____ MEDICAL EQUIPMENT \$ _____

TAXES PAID:

REAL ESTATE TAX..... \$ _____ EXCISE TAX \$ _____ \$ _____
ADDITIONAL STATE TAX PAID WITH LAST YEARS RETURN \$ _____ \$ _____

HOME MORTGAGE INTEREST (List Mortgage Company or individual and amount)

_____ \$ _____ \$ _____ \$ _____

CHARITABLE DONATIONS (List Non-Profit Organization and amount)

CHURCH..... \$ _____ \$ _____ \$ _____
UNITED WAY/CFC.....\$ _____ \$ _____ \$ _____

CHILD CARE EXPENSES LIST NAME, ADDRESS, SOCIAL SECURITY NO. OR FEDERAL ID NO. OF PROVIDER AND AMOUNT PAID

LIST AMOUNTS PAID THROUGH **PRE-TAX PAYROLL DEDUCTION**...(CAFETERIA PLAN)\$ _____

NAME	ADDRESS	ID NUMBER	AMOUNT PAID

RENTAL INCOME AND EXPENSES (Worksheet available if more than one property)

INCOME COLLECTED...\$ _____ LEGAL EXPENSE\$ _____ REAL ESTATE TAXES.... \$ _____
ADVERTISING..... \$ _____ UTILITIES..... \$ _____ MORTGAGE INTEREST \$ _____
TRAVEL EXPENSES..... \$ _____ REPAIRS..... \$ _____ CLEANING & MAINT.... \$ _____
INSURANCE..... \$ _____ SUPPLIES..... \$ _____