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January 2024

Currently for tax season 2024:

- I am willing to schedule short (15-30 min.) in-person meetings, if necessary.
- My office in the M2 building on the 4th floor in downtown Champaign will be open for drop off / pick up from Monday – Friday; 8am – 4:45pm.
- If you live out of the area, please use the TaxDome portal/app to upload documents. (If you need assistance, please email or call).
- If this is not possible, please mail your documents to my office by **March 18th**.
- Please send me ALL pages of ALL your documents, especially brokerage statements.

Regarding the TaxDome portal, those with an email address should have created an account. If your email address has changed, please let me know as soon as possible so I can update your TaxDome account. **For those with a smartphone, Tax Dome has an app where you can scan your documents directly into your portal. You do not need to own/find a scanner, and please do NOT take pictures as I need PDF files.**

Please scan all documents using the same method, preferably the TD app. Look at your documents after uploading them to TD and verify I can read them. Try not to scan duplicates.

For those who will utilize the TaxDome portal, I will upload a copy of the 2023 tax return when it is ready to be e-filed. Please review this copy to determine if I have included all items on your tax return and remember to click “Approved”. You will receive a message from TaxDome to pay my invoice and sign the e-file signature forms. Similar to last year, you will be required to pay your invoice in TaxDome before you can sign the e-file forms.

For those who do not use the portal, I will print your e-file forms, and email them to you as an attachment. When the above forms are returned, including payment, your tax return will be e-filed. If you prefer to use the US Postal Service to sign and return these forms, please send the forms and payment as soon as you receive them.

For those without printers or email access, I will print your e-file forms and send them to you by USPS mail. Please mail back these forms and payment as soon as you receive them.

Please do NOT use staples on your documents. It takes a long time to remove the staples, as I need to scan all your documents into my computer.

This year all documents must be uploaded to the portal or received in my office by March 20, 2024. Otherwise, I may have to file an extension for your 2023 tax returns.

Looking forward to working with you,

Bette