

Dear Friends and Clients,

Welcome to another tax season! Important changes are afoot; more on that **BELOW**... But before I get into the nitty gritty, I invite you to travel along with me:

Although still COVID-shy, we nevertheless ventured forth this year to bring my dad’s ashes to his beloved Tuolumne Meadows in Yosemite National Park. Tom and I drove northward alongside the Eastern Sierras, jogging to the left and right to explore sites that we had as-yet not discovered despite having worn grooves into the familiar pavement on Route 395 on previous passings. Stops included the Mojave Air and Space Center – once a military base, then a NASA test arena, and today home to mothballed commercial jetliners – from which the Rutan Voyager began and ended its 26,000-mile circumnavigation of the globe. Just outside of Big Pine, we were lured off-road by massive radio-



wave telescopes planted amidst sage brush and tumbleweed; one of ten such installations scattered from Hawaii to Puerto Rico. Already familiar with the hexagonal “tiles” of nearby Devil’s Postpile, we detoured through the world’s largest Jeffrey Pine Forest to the Inyo Craters; inverted conical abysses with steep unstable edges dropping into creamy teal and amber-hued puddles far below.

We met up with my sister and brother-in-law at the edge of cobalt blue Tenaya Lake and caravanned through northern California and central Oregon, always seeking out less traveled byways at the outer limits of Nora and Kevin’s anxiety if not their Tesla’s charge capacity. We drove seemingly endless miles through charred forests consumed by the Dixie, Caldor, French, KNP Complex, Cedar Creek, McKinney, Tamarack fires that reduced acres of once vibrant trees to spindly



Occasionally, a flourishing grove would curiously rise from the surrounding ash. At healthy green foliage only

other times, our roadway would separate black and grey desolation to the right from our left; proving that our 2-lane highway had once been a successful fire break. But sometimes. More often than not, fires seemed to have burned unimpeded.

Two weeks in, we parted company and struck out on our own again to explore the Eastern Oregon, (re)discovering the alpine peaks of the Wallowas, the chiseled canyon the painted hills of the John Day Fossil Beds, and the Blitzen Valley carved by glaciers into its textbook U-shape. And still, fire – whether fresh or old, hot or cold – was omnipresent and inescapable.



We became experts of sorts; able to look at ebony stumps, bleached trunks, green undergrowth, and sprouting deciduous trees from which we could determine with reasonable certainty whether a fire occurred within the past year, or 5 years, or a decade or more ago. We looked at the many charred forests with dismay. But we also saw beauty: Strangely, eerily, deep black tree remnants glistened like obsidian. Burned branches tortured in the heat were twisted into unearthly shapes. Fallen trees lay about helter-skelter, covering an otherwise barren landscape that was as macabre as it was mesmerizing.

Fascinating, spellbinding, hypnotic! Just like the world of tax. Allow me to be your guide...

THE TAX PREP PROCESS

Kindly note that I am instituting a few changes this year so that I can better plan my workload and budget my time. To that end, I ask that you note the following due dates:

- DUE January 31st:** While I have in the past waited patiently to hear from each of you in *your* timeframe, I now require your response **on or before Tuesday, January 31st**, indicating that you plan to engage my services for the upcoming tax season. To confirm your intent, you must **submit an Advance Payment of \$500 by check or PayPal** on the [Payments](#) page of my website. This amount will be applied to your invoice when services have been rendered. **NOTE:** Some of you have already submitted a retainer for TY’22 and need not, of course, do so again.



If I have not received your retainer by the end of January 2023, I will presume that we are no longer working together and that you have elected to file on your own or engage another practitioner.

- DUE February 17th:** Please head to the [Home](#) page of my website to download the **Client Packet**, the top-most manila folder in the right-hand sidebar. This packet contains everything you’ll need for the upcoming tax season, including my *Personal Tax Organizer* as well as a list of *Documents Needed for Tax Preparation, Supporting Data Required, Office Policies*, and various forms that you’ll have to sign to jump-start the tax preparation process. Be sure to **sign and return the following to me on or before Friday, February 17th**:

Monica Haven. EA, JD, ULM

- **Engagement Agreement** – please initial on Page 1 and sign on Page 2.
- **Taxpayer Consent** – please sign. **NOTE:** The format of the Taxpayer Consent form is dictated by the US Department of Treasury and is intended to cover all eventualities. I ask that you sign the form to give me permission to calculate your estimated tax payments [which I may otherwise not do] and to use your mail and e-mail addresses [yes, those are considered “taxpayer information”] when I distribute *my* newsletters, web-blasts, articles, or seminar announcements. I promise not to share your information with third parties or in any other manner which you have not authorized.



If I have not received your signed documents by mid-February, I will be unable to work with you and will *automatically* refund any retainer you may have previously submitted.

3. **DUE March 17th:** **Submit your tax data by mail, fax, or scan only.** **NOTE:** In-person appointments are not available for TY’22. Clients unable to scan or print documents, may use a smartphone to create a *clear* image for submission. To ensure the integrity of your data, please use my [secure upload link](#) – it is as simple as dragging and dropping a file into the box. You can even protect your file with a password but will of course have to provide your selected password to me by phone or e-mail. Clients who are unable to use the upload link should provide their materials via tracking services offered by USPS Priority Mail, UPS, or FedEx. I will, of course, acknowledge receipt of your materials and place your file into my queue.



I cannot guarantee timely completion of the tax prep process if data is submitted after the mid-March deadline. As a result, your returns will be placed on extension. **NOTE:** While an extension extends the time for filing, it does not extend the time for payment and so it will be *your* responsibility to estimate your TY’22 tax liability and submit it with the extension request. I will be happy to assist and/or arrange for automatic withdrawal of the amount due.

Individual returns on extension will be due October 16th. To ensure timely filing, I must have all outstanding data **on or before Friday, September 15th.**

Once your returns have been completed, they will be electronically and securely delivered to you. Clients who do not have internet access may request a hard copy of the completed tax packet. You will be asked to sign the **Client Acceptance** form indicating that you have received, downloaded, and reviewed your tax packet. And you will be asked to promptly pay my invoice. Upon receipt of your payment and signed Acceptance, I will provide you with federal and state **e-File Authorization** forms which you must sign and return so that I may submit the returns on your behalf.

FEES: This year, many of my clients will experience a fee increase designed to offset inflationary pressures and institute a pricing schedule that is commensurate with rates charged by tax pros of equal experience and expertise. While I do not wish to announce an across-the-board increase, you should expect a step-up that may range anywhere from 10 to 35%. Clients with whom I’ve worked the longest will see the greatest increase since old-time, long-outdated fees must receive the largest adjustment to adhere to the prevailing rate structure. Presuming that your tax situation remains unchanged from the prior year, your fees for TY’22 will be based upon the fee charged for TY’21 plus a market-rate adjustment. Should your situation become more complex, your fees will necessarily rise further.

DISCOUNTS: Your fee increase may be offset in part or in whole with Student, Senior or Multi-Return Discounts (15%), as well as the Early Bird Discount (10%) given to the first 200 clients who **provide all of their tax data to me on or before Friday, February 17th.**

SERVICE CONTRACT: While I’m always pleased to answer your e-mails and return your calls, I have – with premonition – posted the answers to many of your questions on my website on a page entitled [How to...](#) Topics range from how to reach the IRS, cancel an automatic debit, find out if your amended return has been processed, order a transcript, and simply [have fun](#). Check it out and see just how clairvoyant WikiMonica is! However, if you would like to receive more personalized attention and answers to questions as they pertain *specifically* to you, you may purchase my Service Contract for a flat fee of \$250 rather than incur consultation fees that will otherwise be billed at \$300/hour. The Contract entitles you to *free* year-round consultation on most routine tax issues and is available for a 20% discount if purchased when your returns are delivered to you.

So, let’s get started! Watch the deadlines. And help me to help you...

Monica

Opinions and recommendations stated herein are limited to those issues discussed above. This opinion does not consider or provide a conclusion with respect to any additional issues that may exist. Please be advised that any tax advice in this communication, including attachments and enclosures, was not intended or written to be used—and cannot be used by any taxpayer—for the purposes of avoiding any penalties that may be imposed by the tax authorities.

Monica Haven, EA, JD, ULM

1534 South Edris Drive * Los Angeles, CA 90035 * (310) 286-9161 * FAX (310) 557-1626 * mhaven@pobox.com * website: www.mhaven.net