



MarciAnne Lelinski, CPP, PHR

Client Focused



Dear Tax Client(s),

I wish you and your family a blessed Christmas and a healthy, happy and joy-filled 2023!

- ❖ **IMPORTANT: ML ACCOUNTING HAS MOVED!** There will be appointments at my new home office in Pulaski and my newly rented office on West Mason. Please watch when scheduling your appointments to ensure you get the location/time that works best for you. The follow up appointment emails will have detailed information regarding your appointment location. Appointment options will be as follows:
  - Weekday appointments with Sara and Saturday appointments with Marci, will be at the Mason St. office.
  - Friday appointments with Marci will be at the Pulaski home office.
  - Secure drop offs at the Mason St. office will be available at the reception desk, Mon-Fri from 8am-5:00pm.
  - Drop offs in the Tax Box will be from 7am - 8pm, seven days a week on the front porch of our Pulaski home.

Pulaski Home Address: 4199 Brown County Line Rd, Pulaski WI 54162  
Mason St. Office: Office space inside Executive Office Suites at 1039 W. Mason St, Green Bay WI 54303
- ❖ **PHONE NUMBER:** I no longer carry both cell phones, so my old office number rarely gets checked. Please update your contact information for me to reflect the correct phone number: **(920) 360-4952**. Thank you!
- ❖ **APPOINTMENT SCHEDULING:** On-line scheduling will be open starting on 1/1/23. Simply go onto my website ([www.mlaccounting.com](http://www.mlaccounting.com)) and click on the “Schedule Appointment” button. Be very careful to select the correct type and location for your appointment. Due to Covid, the last two years I have mailed out a large amount of completed returns. For your safety and the security of your information, I prefer to not mail them if at all possible. I will continue to offer this option, but will also be offering more open office hours at the Mason St. location to allow convenient pick up times. In keeping with my “no extensions” rule, I will only be accepting income tax information from **January 29<sup>th</sup> through April 2<sup>nd</sup>**, unless prior arrangements have been made. **Drop off options will be: In person** with Sara or myself. My in-person appointment times are limited, so please schedule a max of one appointment with me. Sara will have a larger number of timeslots open for appointments. **No contact** appointments via the Tax Box (Pulaski) or Receptionist (Mason St.) will be simply a drop off. **The receptionist cannot answer any questions or take any notes from you.** The no contact options still require an appointment so that I can make sure your returns are taken out of the box or collected from reception in a timely manner. However, these two options do offer flexibility. Feel free to come within 2 hours before or after your scheduled time, as long as it is within the open hours for those options (see above). **Pick up options will be:** In-person, mailed out, or sent electronically via a secure link.
- ❖ The IRS will allow electronic signatures again this year. Once you have given me permission to file your return, you will receive your invoice to pay through Square, and your electronic filing form to electronically sign through DocuSign. If you prefer to pay with cash or check, please let me know that when we talk about your return filing.
- ❖ **QUESTIONNAIRE:** Enclosed with this letter is your 2022 Tax Return Questionnaire. Please answer the question portion **completely**. **It is very important that you sign and complete the backside as well.** These questionnaires are extremely important, as they organize much of the information that I need to accurately prepare your return. **They must be completed and returned to me, in order for me to do your return.** Please include them with your tax documents.
- ❖ **REFUNDS/DELAYS:** The IRS says they are on track for timely refunds this year, with most refunds being completed within 21 days of submission. The exception are those with Earned Income Credit and Child Tax Credits to allow time for review. Reviews are done in an effort to combat fraud. These will start to be refunded in mid-February.
- ❖ **IDENTITY CHECKS:** Taxpayers are to expect identity checks to be done by the IRS and WDOR on a random basis again this year. These identity checks are being done to protect you from identity theft as well as stop fraudulent tax returns from receiving refunds. **If you receive a letter from the IRS or WDOR asking you to confirm your identity, please contact me immediately so we can confirm it is authentic.**
- ❖ It appears that Intuit will allow free use of their software to help you calculate the value of non-cash contributions this

year. If you choose to use it, the web address is: <https://turbotax.intuit.com/personal-taxes/itsdeductible/>

- ❖ Keep in mind that as part of the ML Accounting tax family, you are part of group of people that have many talents and businesses. If you are ever in need of a referral for anything, ask. Among my business clients there are; hair salons, financial consultants, marketing /website design, craft goods, collision repair, concrete specialist, fishing charter, logistics, variety of home based sales, artist, equestrian related support, mental wellness, and more!

I look forward to meeting with you soon to prepare your 2022 taxes. Please feel free to call or email me with any questions that you might have - any time - *I'm available year-round for your questions!*

Thank You!



MarciAnne Lelinski, CPP, PHR

Giving professional, individual attention to each of my clients at a very affordable price is what sets ML Accounting LLC apart from other tax preparation and accounting firms. I accepted a **limited** number of new clients this year and they are already in place. I am utilizing a waiting list like last season with the intention of trying to fit them in this year as time allows, or guaranteeing a spot next year. If you know of anyone looking to join us at ML Accounting, please have them reach out to me ASAP. ML has grown completely through friend and family referrals of current clients. **THANK YOU!**

### **Tax Updates and News**

- ✓ If you received money through a 3<sup>rd</sup> party provider like Venmo, and the money wasn't from a friend or family member, you will receive a 1099-K this year. This will be income that needs to be claimed on your return. Please watch for those 1099s and include them with your tax information.
- ✓ The high rates for Child Credit and Dependent Care Credit have gone back to the previous LOWER rates. If you claim children or childcare on your return, expect to have lower refunds this year.
- ✓ For 2021, the age for Earned Income Tax Credit was lowered to help younger, non-students, receive additional support. The age has been raised back to 25 for 2022.
- ✓ The \$300 single / \$600 married deduction for cash contributions on the front of the tax return is no longer a credit. In order to make use of donations on the federal return, you will need to itemize. Up to a 5% credit will still be available on the State side for all donations.
- ✓ Standard mileage rates for 2022 were: **Business** \$ .585 (Jan-Jun) and \$.625 (Jul-Dec), **Medical/Moving** \$.18 (Jan-Jun) and \$.22 (Jul-Dec), (Charitable) \$ .14 (all year).
- ✓ The deduction for PMI (mortgage insurance) has ended and will not be available for 2022.
- ✓ For those of you with small businesses, the QBI credit is set to stay in place through tax year 2025. This means you will continue to get a deduction for 20% of your net income for a few more years.
- ✓ There are new/updated tax credits for purchasing an electric vehicle. There are some new qualifications for this credit. The best website I have found to help you figure if you are eligible is: <https://afdc.energy.gov/laws/electric-vehicles-for-tax-credit>.
- ✓ The new Energy Efficient Home Improvement Credit will include credits starting in 2023 for electric, water heating and temperature control using solar, wind, geothermal, biomass or fuel cell power. These will allow up to a \$1200/year tax credit. For 2022 we are still under the \$500/lifetime max.
- ✓ I often get questions such as "how much more can we make before we hit the next tax bracket?". I have put all of the tax brackets together on one document. That form is available on the Resources tab of my website.

### **ML Accounting LLC**

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