



CAMPANILE & ASSOCIATES, LLC

Accounting • Wealth Strategies • Insurance

January 10, 2024

We hope this finds you well.

This letter and tax questionnaire are being sent out to all of our clients in preparation of the 2023 tax season.

The tax questionnaire **MUST** be filled out and returned along with **hard** copies of all your information so that we can complete your tax return accurately and in a timely manner. Please do not drop off tax paperwork until you have **all** of your information. There will be an additional fee for tax information that is dropped off after the return has been completed. Dependent children tax returns are \$40.00. We have transitioned to paperless. A pdf of your return will be emailed to you.

Office hours beginning February 1st will be Monday-Thursday 9am-7pm, Friday 9am-5pm, and Saturday 10am-4pm. There is a secure drop box next to the front door for anyone having to drop off tax information outside of business hours. If you have a specific or complicated tax issue, we ask that you schedule an appointment online at www.campanilecpa.com.

S-Corporation and Partnership returns and/or extensions are due March 15th. Any of these returns dropped off after February 28th **will** be put on extension.

All other tax returns received after March 31st **will** be put on extension. **If you plan on filing an extension you MUST call the office prior to April 14th.** There will be a \$40.00 fee to file an extension. Please note that extensions are for tax return filing only. If you think you will have a balance due to the IRS or state that amount or an estimate of it is still due April 15th. The IRS or state will issue a late payment penalty if it is not paid on time. All tax returns on extension must be dropped off prior to September 30st or we cannot guarantee them to be completed by October 15th.

Please contact us with any questions.

Thank You,

Vincent Campanile, CPA & Staff

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Securities offered through TFS Securities, Inc. Member FINRS/SIPC
A full service broker dealer located at
874 Broadway, Bayonne, NJ 07002
201.823.1030

CAMPANILE & ASSOCIATES LLC
2023 Tax Questionnaire

Name _____ Address _____ Phone _____ Email _____	Occupation _____ Taxpayer _____ Spouse _____
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A PDF COPY OF YOUR TAX RETURN WILL BE EMAILED TO YOU

FILING STATUS (If changed)

☐ Married filing joint ☐ Married filing separate ☐ Head of household ☐ Single

NEW DEPENDANTS (If any)

Name _____
Date of birth _____
Social Security # _____

DEPENDANTS IN COLLEGE? We need 1098-T - Tuition Statement

DIRECT DEPOSIT (If changed)

Routing # _____
Account # _____

RENT ? Amount paid \$ _____

HEALTH INSURANCE WITH MARKETPLACE? We need 1095-A Health Insurance Statement

COLLECT UNEMPLOYMENT? We need 1099-G (you must print from unemployment website)

OUT OF POCKET MEDICAL Total amount \$ _____

ESTIMATE TAX PAYMENTS (if made)

Federal Payment 1st \$ _____ 2nd \$ _____ 3rd \$ _____ 4th \$ _____
State Payment 1st \$ _____ 2nd \$ _____ 3rd \$ _____ 4th \$ _____

******ADDITIONAL NOTES (Please use back)******