



**New Address: 2611 12<sup>th</sup> Street S., Suite A  
Wisconsin Rapids, WI 54494**

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# THIS MAILING CONTAINS IMPORTANT INFORMATION

## REMINDERS

WE MOVED IN JANUARY 2023...OUR ADDRESS IS

2611 12<sup>TH</sup> STREET SOUTH – WISCONSIN RAPIDS WI 54494

PLEASE USE THE PARKING AREA AND ENTRANCE LOCATED ON CLYDE AVENUE

WE HAVE AN INSURANCE AGENT IN HOUSE

COLTON KISSINGER – THE INSURANCE CENTER – (715) 507-5174 – [CKISSINGER@TICINSURANCE.COM](mailto:CKISSINGER@TICINSURANCE.COM)

HOW COLTON CAN HELP: HEALTH, LIFE, MEDICARE, DENTAL, VISION, DISABILITY AND GROUP PRODUCTS

IN PERSON APPOINTMENTS ARE AN ADDITIONAL CHARGE

TO TRY TO KEEP PRICES FAIR FOR ALL CLIENTS THERE WILL BE AN ADDITIONAL CHARGE FOR IN PERSON TAX APPOINTMENTS AS THEY REQUIRE ADDITIONAL TIME AND SERVICES. THE FEE WILL BE \$35 PER 1/2 HOUR APPOINTMENT AND \$65 PER 1 HOUR APPOINTMENT.

NON-APPOINTMENT RETURNS CAN BE SUBMITTED VARIOUS WAYS

YOU CAN DROP OFF, FAX, EMAIL, MAIL OR TEXT. QUESTIONS CAN BE EITHER NOTED ON YOUR PAPERWORK OR EMAILED TO US.

WE MAKE EVERY ATTEMPT TO HAVE THESE RETURNS DONE IN ABOUT 3 WEEKS.

TAX RELATED CORRESPONDENCE

IF YOU RECEIVE ANY CORRESPONDENCE/LETTERS/NOTICES IN REGARD TO YOUR TAX RETURN, PLEASE GET US A COPY IMMEDIATELY SO WE CAN ADDRESS THE SITUATION. WE WILL THEN ASSIST YOU IN PUTTING TOGETHER ANY NECESSARY DOCUMENTS. THIS WILL HOPEFULLY RESOLVE THE ISSUE SOONER AND PREVENT ONGOING ISSUES. ALSO, JUST BECAUSE THEY SEND A LETTER DOESN'T MEAN THEY ARE RIGHT!

WE WILL BEGIN TAKING APPOINTMENTS ON TUESDAY, JANUARY 2<sup>ND</sup>, 2024.

YOU WILL NOT BE ABLE TO LEAVE A VOICEMAIL FROM FRIDAY, DECEMBER 29<sup>TH</sup>, 2023 AT 4PM UNTIL TUESDAY JANUARY 2<sup>ND</sup>, 2024 AT 8AM.

PLEASE MAKE SURE YOUR MESSAGE CONTAINS THE FOLLOWING INFORMATION:

FULL NAME INCLUDING SPELLING

DATES, DAYS, TIMES, DATE RANGE THAT YOU WISH TO BE SCHEDULED

PHONE NUMBER THAT A VOICEMAIL CAN BE LEFT AT IF YOU DON'T ANSWER

IF YOU NEED A TEXT MESSAGE REPLY, PLEASE SPECIFY THAT WHEN CALLING

IF THE APPOINTMENT IS FOR MORE THAN A SINGLE PERSON OR A MARRIED COUPLE.

PLEASE LET US KNOW OF ANY OTHERS THAT WILL NEED TAXES PREPARED AT THE APPOINTMENT TIME SO WE CAN SCHEDULE ACCORDINGLY

YOU DO NOT NEED ALL YOUR TAX INFO WHEN YOU SCHEDULE BUT YOU MUST MAKE SURE YOU HAVE IT BY YOUR SCHEDULED APPOINTMENT. MOST DOCUMENTS MUST BE POSTMARKED BY JANUARY 31<sup>ST</sup>. HOWEVER, IF YOU HAVE ANY INVESTMENTS, IT IS POSSIBLE THAT THOSE MAY NOT BE MAILED OUT UNTIL THE MIDDLE OF MARCH. PLEASE PLAN ACCORDINGLY WHEN SCHEDULING. THE BASE RATE FOR TAX PREP IS \$130 FOR NON APPOINTMENT RETURNS. HOWEVER THIS MAY FLUCTUATE BASED ON THE COMPLEXITY OF THE RETURN. IN PERSON TAX PREP APPOINTMENTS WILL BE CHARGED THE ADDITIONAL FEE SO PLEASE PLAN ON PAYING AT THE TIME OF YOUR APPOINTMENT.

WE WILL NOT ANSWER THE TELEPHONE FROM TUESDAY, JANUARY 2<sup>ND</sup> THROUGH MONDAY, JANUARY 8<sup>TH</sup>.

PLEASE BE PATIENT AS IT CAN TAKE UP TO 48 HOURS TO REPLY TO YOUR APPOINTMENT REQUEST

IF YOU NEED SOMETHING DURING THIS TIME OTHER THAN MAKING AN APPOINTMENT

I WOULD SUGGEST EMAILING THE OFFICE FOR THE FASTEST RESPONSE

OFFICE HOURS ARE:

	OFF SEASON	TAX SEASON (JANUARY 20 <sup>TH</sup> – APRIL 18 <sup>TH</sup> )
MONDAY	8-4	8-8
TUESDAY	8-6	8-8
WEDNESDAY	8-4	8-8
THURSDAY	8-4	8-8
FRIDAY	8-4	8-6
SATURDAY	CLOSED	8-4
SUNDAY	CLOSED	CLOSED

PLEASE NOTE THESE ARE NOT TAMI'S HOURS. THESE ARE THE HOURS THAT STAFF WILL BE IN THE OFFICE. TAMI HAS SEVERAL BUSINESS CLIENTS THAT SHE WORKS WITH OUTSIDE THE OFFICE.

STAFF IS AVAILABLE TO OFFER YOU AS MUCH ASSISTANCE AS THEY CAN. THEY DO NOT PREPARE TAXES SO PLEASE BE RESPECTFUL IF THEY CAN'T ANSWER A QUESTION YOU HAVE. PLEASE LEAVE A MESSAGE WITH THEM AND THEY WILL CONTACT TAMI AND GET AN ANSWER FROM HER FOR YOU ASAP.

ENCLOSED YOU WILL FIND THE FORM FOR YOUR PERSONAL INFORMATION AND A DOCUMENT CHECKLIST TO GO OVER. FOR EITHER TYPE OF TAX PREP PLEASE FILL OUT THE INFO FORM IN ADVANCE SO WE CAN QUICKLY MAKE SURE ALL THE INFO IS UPDATED ON YOUR FILE. THE CHECKLIST IS A GREAT GUIDE TO MAKE SURE YOU HAVE ALL NECESSARY DOCUMENTS. WE ALSO REQUIRE A COPY OF YOUR DRIVERS LICENSE/STATE ID AND COPIES OF SOCIAL SECURITY CARDS FOR ANYONE NEW ON YOUR TAX RETURN AND/OR IN THE EVENT OF A NAME CHANGE.

IF YOU HAVE RENTAL PROPERTIES, A BUSINESS, A FARM OR ANYTHING THAT YOU DON'T SEE INFO FOR IN THIS MAILING; PLEASE CONTACT THE OFFICE TO REQUEST ADDITIONAL INFO ON WHAT IS NEEDED FOR THESE. YOU CAN CALL 715-424-6944 OR EMAIL [APLUSLLC.FRONTOFFICE@GMAIL.COM](mailto:APLUSLLC.FRONTOFFICE@GMAIL.COM).

**\*\*\*\*\*ADDITIONAL TAX TRIVIA ITEMS\*\*\*\*\***

**WISCONSIN HOMESTEAD CREDIT**

THIS CREDIT IS DESIGNED TO SOFTEN THE IMPACT OF PROPERTY TAX AND RENT ON PERSONS WITH LOWER INCOMES. YOUR HOUSEHOLD INCOME CAN NOT EXCEED \$24,680.00 TO BE ELIGIBLE. YOU MUST HAVE OCCUPIED AND OWNED/RENTED A HOME, APARTMENT OR OTHER DWELLING THAT IS SUBJECT TO WISCONSIN PROPERTY TAXES DURING 2023. YOU MUST BE ONE OF THE FOLLOWING: 62 OR OLDER AS OF 12/31/23, BETWEEN 18 AND 61 AS OF 12/31/23 AND HAVE EARNED INCOME, ANY AGE AND MEET THE WI DEFINITION OF BEING DISABLED. IN ORDER TO VERIFY YOUR ELIGIBILITY, YOU MUST PROVIDE YOUR 222 PROPERTY TAX BILL WHETHER PAID OR NOT OR A RENT CERTIFICATE COMPLETED BY YOUR LANDLORD FOR RENT PAID IN 2023. IF YOU NEED A RENT CERTIFICATE, PLEASE CONTACT THE OFFICE.

	<u>MILEAGE RATES (PER MILE IN CENTS)</u>	
<u>TYPE</u>	<u>2023</u>	<u>2024</u>
BUSINESS	65.5	67
MEDICAL	22	21
VOLUNTEER/CHARITABLE	14	14

	<u>PER DIEM RATES FOR OTR OWNER OPERATORS</u>	
<u>TYPE</u>	<u>2023</u>	<u>2024</u>
FULL PER DAY	\$69	\$69
PARTIAL PER DAY	\$51.75	\$51.75

THE ACTUAL DEDUCTION FOR DRIVERS:

SUBJECT TO DOT SERVICE LIMIT OF HOURS IS 80% OF THE ABOVE AMOUNTS  
 NOT SUBJECT TO DOT SERVICE LIMIT OF HOURS 50% OF THE ABOVE AMOUNTS

	<u>ANNUAL GIFT TAX LIMITS</u>	
	<u>2023</u>	<u>2024</u>
	\$17,000	\$18,000

REMINDER THESE LIMITS ARE PER PERSON LIMITS:

A MARRIED COUPLE COULD GIFT ANOTHER MARRIED COUPLE 4 TIMES THE ABOVE AMOUNTS

**INDIVIDUAL TRADITIONAL OR ROTH IRA CONTRIBUTION LIMITS**

	<u>2023</u>	<u>2024</u>
	\$6500	\$7000

TAXPAYERS AGED 50 OR OVER CAN CONTRIBUTE AN ADDITIONAL \$1000 PER YEAR AS A CATCH UP

**SIMPLE IRA CONTRIBUTION LIMITS**

	<u>2023</u>	<u>2024</u>
	\$15,500	\$16,000

TAXPAYERS AGED 50 OR OVER CAN CONTRIBUTE AN ADDITIONAL \$3500 PER YEAR AS A CATCH UP

**401K, 4013B, MOST 457 PLANS AND FEDERAL GOVERNMENT THRIFT SAVINGS PLAN CONTRIBUTION LIMITS**

	<u>2023</u>	<u>2024</u>
	\$22,500	\$23,000

TAXPAYERS AGED 50 OR OVER CAN CONTRIBUTE AN ADDITIONAL \$7500 PER YEAR AS A CATCH UP

**HSA CONTRIBUTION LIMITS**

	<u>2023</u>	<u>2024</u>
SINGLE	\$3850	\$4150
FAMILY	\$7750	\$8300

TAXPAYERS AGED 55 OR OVER CAN CONTRIBUTE AN ADDITIONAL \$1000 PER YEAR AS A CATCH UP