Hurst, Kelly & Company LLC
3293 Montgomery Road, Loveland OH 45140
513-234-0977
www.hurstkelly.com

Check out our new website!
www.hurstkelly.com

See office hours, download forms, & pay your invoice

Tax Year 2022 Information

2022 Tax Year Client Organizer – Review all pages of organizer and update information as applicable. Verify accuracy of cell phone number(s) and email address(es) on page 1. Please review and answer questions on page 4.

Please also make note on the face of the organizer (or a separate area within your tax packet) of any **significant life changes** that may have occurred during the year (marriage, divorce, having a child, moving, so on) – when in doubt, please make note and we will reach out with follow-up questions.

IMPORTANT DATES!

Submit your tax documents as early in the tax season as possible. Most tax returns where complete information has been submitted to our office by **March 15th** will likely be completed by the **April 15th** due date. Tax packets received near (and after) **March 15th** will likely need to be extended. The IRS requires individuals to file or extend tax returns by **April 15th**. Choose any option below to submit your tax information.

- Mail to our office using the enclosed envelope.
- Deposit into our secure drop box located just outside our office door *(24/7 access).* ***No need to verify your documents have been received.***
- Drop off in-person with our receptionist.
- Scan and upload your tax documents to our secure client portal, SmartVault at **https://hurstkelly.smartvault.com**. *Once completed*, email stephaniewilms@hurstkelly.com to verify receipt. *First time users, please call Stephanie Wilms at (513) 234-0977, ext. 106 for assistance.*

Extending your Tax Return:

Call Stephanie Wilms, (513) 234-0977, ext. 106 or **email stephaniewilms@hurstkelly.com** for assistance.

- Individual Tax Return – Form 1040: Contact us by: **April 1st, 2023**
- Business tax returns (Forms 1065 and 1120S) for Dec. 31, 2022, year-ends: Contact us by: **March 8, 2023**

Please Provide the Following: Invalid and/or expired driver's license/state ID information will cause processing delays and may even result in your returns being rejected. Please ensure we have the most current information for both you and your spouse, if applicable.

	Taxpayer	Spouse (if any)
License/ID - Full Name		
License/ID - Issuing State		
License/ID - Number		
License/ID - Issue Date		
License/ID - Expiration Date		

2022 HSA Account: Include Form 1099-SA. If you have not received your form, log into your account and print.

2022 College or University Tuition and Expenses: Include Form 1098-T. Generally, Form 1098-T is not mailed. Log into your account and print. List other educational expenses separately with a summary of the total amount paid.