

WELCOME TO  
**2024 TaxMatters**  
*Happy New Year*



## Prepare to File Your Taxes NOW!

Filing for Tax Season 2023 is almost here!  
We will begin to schedule appointments starting  
January 23, 2024.

The IRS has not released their official E-File date  
for the new season, however this is around the  
time they typically begin allowing submission of  
returns.

Get on the schedule EARLY so you can be first in  
line when the door opens!

Call us today @ 202.563.7640

**SCHEDULE APPOINTMENT HERE**

## New Location Alert

### WE ARE A VIRTUAL TAX OFFICE NOW

As part of our commitment to providing you with the best possible service, we are thrilled to announce that our office is now 100% virtual. This transition allows us to offer you a more convenient and flexible experience when managing your tax and accounting needs. Whether you're at home, in the office, or on the go, we are just a click away to assist you.



**WE HAVE  
MOVED**

# My 2 Cents

By Stephanie Fauntleroy, EA



I would like to first wish everyone reading this a happy and prosperous New Year. I bring you this message with an overflowing heart filled with anticipation, anxiety, excitement, hope and unexpected sadness. It is with a very heavy heart that I make you aware of the loss of myself and my husbands oldest Son, Kameron Mills. I struggled about making this a part of my business' newsletter because I wasn't sure it was appropriate. However, what I've come to understand is that this is a family business and my clients are near and dear to my heart as I am sure I am to many of you. So rather than having to relive this horrific experience multiple times per day for the next coming months, I've decided to share it here. It's important for me to let you know that I am healing daily and supported by my faith and loved ones. I do not wish to ask you for anything beyond prayers and grace. I thank you from the bottom of my heart for your care and understanding during this difficult time.

As far as Tax Season 2023 is concerned, as my beloved Father, Stephen Baker would say, NO MORE BUSINESS AS USUAL, therefore I have made several changes this year. In response to the evolving landscape and to provide you with increased convenience, I am thrilled to announce that our office is now 100% virtual. This change enables you to access our services from the comfort of your own space, giving you the flexibility and convenience you deserve.

I understand that some clients may prefer in-person meetings or face challenges with virtual appointments. To address this, I am actively exploring various options to ensure we can accommodate your needs, whether it's through traditional in-person meetings or other suitable solutions. Please understand this decision was not made lightly and I am committed to working out each and every kink to create a seamless process.

This year our incredible team will consist of a few faces and voices you know to include Mr. Cornell Stone, Mrs. Darlene Montgomery and we welcome my Son Mr. Jahlani Jackson to the customer service team. I would like to thank Ms. Kia Jackson and Mrs. Deborah Gerald for their tireless commitment to the team last year and I expect you may hear their voices a time or two in the future as well. I would also like to acknowledge the ongoing behind the scenes support of Mr. Ty Short (IT) and my husband, Mr. Sherman Fauntleroy (IT and everything else). This move was not easy but each person named here and a few others made sure it was seamless and I am eternally grateful.

In light of the evolving market and to continue providing top-tier service, I am slightly increasing our pricing. I understand the importance of fair and transparent pricing, and this adjustment will allow us to maintain the quality and expertise you rely on. As usual our prices will continue to be below competitive prices and based on scope of work. Please feel empowered to discuss pricing prior to engaging in our service.

I am also pleased to announce that I will continue to offer pay-with-refund options. Additionally, I am implementing new options for paying over time. My goal is to make our services even more accessible and manageable for you while still considering the needs of the business.

As I have for the past 12 years, I appreciate your trust in me and am committed to providing you with the highest level of service, whether it's in the virtual realm or through our expanded service offerings. Your success remains my priority.

I thank you from the bottom of my heart for being a part of the Baker's Tax family. I look forward to serving you in Tax Season 2024 and beyond, as we continue to embrace change and enhance our services.

*Stephanie Fauntleroy, EA*

# I am an ENROLLED AGENT

I am delighted to share some exciting news with you – I have recently earned my Enrolled Agent License, and I want to explain what this means for you and for our business.



Becoming an Enrolled Agent is a significant milestone in my career. It represents an enhanced level of expertise and commitment to serving you in the realm of taxation. With this license, I am now authorized by the IRS to represent you in matters related to taxation, a privilege I take very seriously.

What does this mean for you as a client? It means you have an even more knowledgeable and dedicated tax professional on your side. Whether it's addressing IRS matters, optimizing your deductions, or planning your financial future, my Enrolled Agent License allows me to provide you with a higher level of service and expertise.

Taxes can often seem complex and daunting, but with this new credential, I am better equipped to navigate the intricacies of the tax code on your behalf. My goal is to make your tax journey as smooth, efficient, and successful as possible.

This achievement also reflects positively on our business. It highlights our commitment to offering you the highest quality service and expertise. We are continually striving to improve our capabilities as a team to better serve your needs.



## Expanding Our Services:

Exciting news! We are expanding our service offerings to include payroll, bookkeeping, and advisory services. Initially, these services will be available to a select few clients. However, we plan to extend these offerings to all clients in the near future.

[INQUIRE HERE](#)



## "In This Scenario"

Join us for "In This Scenario" our new online video series that explores real situations with real clients that are common to most taxpayers. Discover new ways to navigate taxes with ease and confidence. Subscribe to our YouTube Channel for notifications!



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# Tax Tips



## PREPARATION FOR THE UPCOMING TAX FILING SEASON

**The filing season for 2023 tax returns will soon be upon us. A little advance preparation can prevent stressful tax time surprises. Here are some important steps you can take now to set yourself up for worry-free tax filing:**

- If your name changed in 2023, report the change to the Social Security Administration (link below) as soon as possible, preferably before the end of the year.
- Locate your bank account information, including both your account number and the bank routing number, so you can receive your tax refund by direct deposit.
- Watch for year-end income statements, especially in late January and early February. These statements may include W-2 forms, along with 1099-NEC, 1099-MISC, 1099-INT, 1099-G and other 1099 forms. Note that some of these forms may come by mail, while others may be sent to you electronically. Keep all of the forms together and organized.
- Organize records for tax deductions and credits. These records may include Form 1095-A (Health Insurance Marketplace Statement), tuition statements (Form 1098-T), medical bills, mortgage interest statements, and home energy improvement or clean vehicle receipts or invoices.
- Waiting until the last minute to try to assemble these documents can lead to missing the filing deadline, so start early.

**VISIT YOUR PORTAL  
TO START UPLOADING YOUR DOCUMENTS  
EARLY!**

**CLICK  
HERE**

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