

PROFESSIONAL  
SERVICES

Season's Greetings Family! It is time to start preparing for the 2023 tax season.

**First and foremost, we will have very limited face to face appointments this year. We will not be able to reschedule appointments.** If you would like one of these please contact us at [info@psbtstax.com](mailto:info@psbtstax.com) or 303-425-9119. Below are the preferred methods.

Upload to our secure portal <https://professionalservices.securefilepro.com/portal/#/login> (upload your docs through the Guest Exchange), email to [info@psbtstax.com](mailto:info@psbtstax.com), mail or drop off.

We will continue the first come-first serve drop off system for 2023 taxes. If you do not have everything that is required when we receive your documentation your return will not be started and put in the pending file until all documents are received. Please only upload, email, or mail your documents when you have everything to complete them. This is to utilize everyone's time efficiently.

**Please note we are unable to take new clients.**

Tax returns must include the following in order to be put in the queue for processing:

- Payment (Fees are mostly the same as last year. If your fee is different we will send you a notice via email).
  - We accept cash, check, Venmo (@betty-smith-85), Zelle (info@psbtstax.com) and credit card, but please note credit card payments are subject to a 5% fee.

Please go to the website for all forms required for processing your tax returns:

- Signed authorization form for all taxpayers
- Basic taxpayer information sheet (If there have been any changes since last year)
- Any questions you would like Betty to address
- Valid contact number if Betty has questions
- We are accepting only clear copies of your tax documents to ensure you have your original copies. The copies submitted to our office will be scanned for reference if needed and the copies will be shredded after scanned. **Do not send originals.**
- Driver's license number, date issued & expiration date.

Please submit your documentation to us at your earliest convenience. To ensure your taxes are prepared without the possibility of needing an extension, your tax paperwork **MUST** be submitted by March 30, 2024. We will automatically file an extension for any documents received after March 30, 2024 and if they will not be completed in time; however, if you need an extension and we do not have your tax documents you need to submit a \$50 fee and extension request.

When your taxes have been completed, we will notify you using the contact information provided in the updated taxpayer information sheet. Most returns can be signed through DocuSign, which you will see come from Shauna when your taxes are completed. We will be sending all completed returns **electronically** this year unless a paper copy is requested. **Any additional copies requested throughout the year will be a \$75 fee paid up front.**

Betty has only two (2) more years of tax season until she retires!

Betty Smith and Shauna Philippus  
[www.bettysmithprofessionalservices.com](http://www.bettysmithprofessionalservices.com)

