

**HARK AND ASSOCIATES, PC.**  
40 Lloyd Avenue, Suite 201 Malvern, PA 19355  
www.harkandassociatespc.com  
610-889-2590 Phone 610-889-0398 Fax

**If we do not have ALL of your tax information in our office by March 15, 2024, your tax return will be extended. If extended, we will provide you with an amount due to file with an extension by April 15<sup>th</sup>, 2024 and complete the return after the April 15<sup>th</sup> deadline.**

To our clients:

Enclosed please find an envelope to submit your 2023 tax information. If you utilized and returned your 2022 organizer, one has been provided for your 2023 information. **Please check your organizer for accuracy of all preprinted information and update any pertinent information.**

- **PROVIDE COPIES, NOT ORIGINALS** - All tax information you wish to retain for your files should be **copied prior to submission, with the copies given to us**. All submitted documents will be retained in our files. If you request copies to be made so that originals are returned, *there will be additional fees charged*.
- **ESTIMATED PAYMENTS** - Many of our questions to clients involve estimated payments. Please fill out the estimated payment sheet with the dates and amounts paid. If no estimates were made, please note that.
- **LOCAL RETURNS** - If you are required to file a local tax return, please let us know AND send us a copy of the original form for completion. We do not contact localities to determine their requirements. Local tax returns will be loaded on the client portal (to be printed/signed/mailed) or mailed to you if you are not using the portal.
- Your tax return includes a box that would allow Hark and Associates, PC., as the preparer, to discuss the return with the IRS. If you would like this box checked, please indicate this in your tax organizer.
- **DO NOT EMAIL information to anyone at Hark & Associates, PC.** Either load the information on the portal or mail it. Due to issues with SPAM and other email technicalities, we cannot be responsible if information is missed that was emailed to an associate.
- **We will use our client portal as our delivery method for copies of your tax returns. You will then be able to download an electronic file to your own computer.**
- Requests for additional copies of tax returns throughout the year, current or prior, will be charged a \$50.00 administrative fee plus .25 cents per page and postage. **We are not permitted to fax or e-mail tax returns due to privacy issues.**

Thank you for your cooperation!

Hark and Associates, PC.

# 2023 Tax Return Information

## PLEASE RESPOND

Print Name: \_\_\_\_\_

Your federal, state and local tax returns **will be** loaded on our secure portal for you to download and save onto your computer. An Adobe email will be sent to you for electronic signature of the e-file forms. *We need a separate email for the primary and spouse.* To make sure we use the correct emails, please provide them below:

**Primary Email:**

\_\_\_\_\_

**Spouse Email:**

\_\_\_\_\_

# **I DO NOT WANT TO E-FILE MY TAX RETURN**

**(DO NOT COMPLETE THIS FORM IF YOU ARE E-FILING YOUR TAX RETURN)**

## **Electronic Filing Waiver**

I do not want to electronically file my Individual Income Tax Return\*.

A copy of my taxes will be mailed to me and will not be put on the portal.

I understand that a Form 8948 will be attached to my return for filing.

Signature: \_\_\_\_\_

Print Name: \_\_\_\_\_

Date: \_\_\_\_\_

\*Additional fees may apply for paper file returns.

Name: \_\_\_\_\_

Tax Year: 2023

## 2023 Estimated Payments

In order to eliminate phone calls while preparing your 2023 tax returns, please fill in the dates and amounts paid for your quarterly payments made for the 2023 tax year.

<b>Estimated Payments</b>	<b>Date</b>	<b>\$ Amount</b>
<b>1<sup>st</sup> Voucher (April 2023)</b>		
Federal	_____	_____
State	_____	_____
Local	_____	_____
Other	_____	_____
<b>2<sup>nd</sup> Voucher (June 2023)</b>		
Federal	_____	_____
State	_____	_____
Local	_____	_____
Other	_____	_____
<b>3<sup>rd</sup> Voucher (September 2023)</b>		
Federal	_____	_____
State	_____	_____
Local	_____	_____
Other	_____	_____
<b>4<sup>th</sup> Voucher (January 2024)</b>		
Federal	_____	_____
State	_____	_____
Local	_____	_____
Other	_____	_____



## DISCLOSURE STATEMENT

Federal law requires this consent form to be provided to you. Unless authorized by law, we cannot disclose, without your consent, your tax return information to third parties for purposes other than the preparation and filing of your tax return. If you consent to the disclosure of your tax return information, federal law may not protect your tax return information from further use or distribution.

You are not required to complete this form. If we obtain your signature on this form by conditioning our services on your consent, your consent will not be valid. If you agree to the disclosure of your tax return information, your consent is valid for the amount of time that you specify. If you do not specify the duration of consent, your consent is valid for one year.

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration by telephone at 1-800-366-4484, or by email at [complaints@tigta.treas.gov](mailto:complaints@tigta.treas.gov)

Tax Year:     2023

Dated:           \_\_\_\_\_

Signature:       \_\_\_\_\_

Print Name:     \_\_\_\_\_

Address:         \_\_\_\_\_

\_\_\_\_\_

**IMPORTANT- PLEASE READ AND RETURN TO US**

**Reporting Foreign Bank and Financial Accounts**

- If you have a financial interest in, or signature authority over one or more accounts in a foreign country, you are subject to additional reporting requirements.
- Form 1040, Schedule B, Part III must be completed if the taxpayer: a) had over \$1,500 of taxable interest or ordinary dividends; b) had a foreign account; or c) received a distribution from, or was a grantor of, or a transferor, to a foreign trust. Line 7a of Part III asks if the taxpayer has signature authority over financial accounts in a foreign country of more than \$10,000.
- Please answer the following questions taken from Schedule B, Part III Foreign Accounts and Trusts and return to us with your tax information.

<b>Part III</b>		
<b>Foreign Accounts and Trusts</b>		
You must complete this part if you (a) had over \$1,500 of taxable interest or ordinary dividends; (b) had a foreign account; or (c) received a distribution from, or were a grantor of, or a transferor to, a foreign trust.		
	Yes	No
<b>Caution:</b> If required, failure to file FinCEN Form 114 may result in substantial penalties. Additionally, you may be required to file Form 8938, Statement of Specified Foreign Financial Assets. See instructions.		
<b>7a</b> At any time during 2023, did you have a financial interest in or signature authority over a financial account (such as a bank account, securities account, or brokerage account) located in a foreign country? See instructions . . . . . If "Yes," are you required to file FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR), to report that financial interest or signature authority? See FinCEN Form 114 and its instructions for filing requirements and exceptions to those requirements . . . . .		
<b>b</b> If you are required to file FinCEN Form 114, list the name(s) of the foreign country(-ies) where the financial account(s) is (are) located: _____		
<b>8</b> During 2023, did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust? If "Yes," you may have to file Form 3520. See instructions . . . . .		

For Paperwork Reduction Act Notice, see your tax return instructions. Cat. No. 17146N **Schedule B (Form 1040) 2023**

- Unless requested in writing by the client, Hark & Associates, PC will **not** be responsible for filing FinCEN Form 114. The taxpayer must file electronically FinCEN Form 114 by April 15, 2024, unless noted otherwise in writing. The form can be found at [www.irs.gov](http://www.irs.gov). Failure to timely file this form may result in substantial penalties. If you have any questions as to whether you are responsible to file the form, please contact our office. We cannot stress enough your compliance with this filing!

If you have any type of foreign assets, you must inform us as there may be additional reporting requirements while preparing your tax returns.

**Cryptocurrency**

- **Did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency? If yes, please provide specific information:**

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