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| **Frequently asked Questions** |
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**From all of us at Sartell Tax and Accounting Services, Inc. we appreciate you choosing to complete your tax return with us. Below is a list of the most frequently asked questions we find people have after their tax return is completed. Have a wonderful year and we will see you next year!**

**When will I get my refund?**

Receipt(s) of refunds is always a tricky question. We have no way from our software to determine when you will receive your refund. We suspect that this year we will see an increase in delays as the IRS is very behind. The good news for you is there is a way you can check in on the status of your refund yourself. Both IRS and MN Dept of Revenue have online “Where’s my Refund” links you can check. To access these links, visit our website at www.sartelltaxservice.com and go to the FAQ tab. Click “Where’s my refund” and the links will be listed below. The IRS also offers an app called IRS2Go. (Note: It takes up to 48 hours after the IRS and MN have accepted your return to show up on the tracker.) This could take up to 5 business days to occur.

**Property tax returns**

Property tax statements usually arrive at the end of March. If you had your taxes completed prior to these statements being released, you may see an estimated refund amount on your taxes based on your 2023 estimated property tax statement. The refund amount may change after getting the statement in March entered. If your taxes are completed after property tax statements are released the amount printed is the correct refund amount and your MNPR will be present in your tax papers. After the completion of tax season, we will complete all remaining property tax returns. You will receive your MNPR statement from us in the mail no later than August 15th with your correct refund amount. If you were expecting a refund and did not receive a statement after August 31st, feel free to contact us to discuss your refund qualifications. (All residents of a single location must have all income included when considering the qualification of a property tax return.) Property Tax statements are available for us to view online so do NOT bring in your hard copy unless we ask. Once you get the letter you can check on the status with MN at the same refund site above, we e-file as we go.

**Contacting us during tax season**

We understand questions and concerns arise during this stressful time of year for everyone. When calling with a question or concern the person who answered will direct you to the answer. If they are unable to address your need, they will schedule a time where you can directly talk to Christie or Diane.

**Off Season office schedule**

Off season office scheduling is subject to change due to family needs. Please remember we are busy Mom’s and occasionally will need to adjust our schedules. Diane currently will be in the office on Tuesdays and Christie will be in the office one day a week. We also have our office manager Lucy in the office one day as well checking emails and voicemails. Please call prior to coming to make sure someone is in the office to take care of your needs.

**I need another copy of my tax return.**

For an additional printed copy of your tax return it will be $20 whether printed at appointment or in the future. Another option is we can email you a copy to the email we have in your tax return. We can not email anywhere else without an consent to disclose filled out. The consent to disclose can be found on our website. Copies will be password protected with the first four letters of the taxpayers last name and the last 5 numbers of the taxpayers social security number not the spouse (xxxx11111).

**Received an IRS or MN Dept of Revenue letter**

If you received a letter from either the IRS or the MN Dept of Revenue, we will need to see the letter before we can help you understand the letter you received. You can drop it off or upload a copy to SecureFilePro. There is a link on our website you can upload as a guest. Please don’t email us with an attachment we don’t open emailed attachments due to security reasons.

**Need to make changes to tax return**

We wait 3 business days after you have signed the 8879 to e-file your tax return so that you have time to look it over. Please review your return immediately. If there is something missing or not making sense to you call, leave a message, or come to the office so we can correct it before filing. We at least need to remove your return from the e-filing set.

**Need an Amendment filed**

Amendments will be filed after tax season is complete and your original return has been fully processed. If you have a change that needs to be made, let us know so you can be put on our list. Please drop off the information we would need for the amendment such as, an extra w-2, missed dividends, etc. Amendments due to preparer error will be completed free of charge. Amendments due to taxpayer error are completed with a charge of $75 for Federal and $50 for State. Amendments due to employer error will be billed to the taxpayer with a paper copy of bill for taxpayer to submit to their employer. Your accountant will call you when your amendment is completed with further instructions on how to file. Federal amendments can usually be e-filed, MN can not and you will need to mail it. We suggest using tracking when mailing your amendment.

**Social Media**

Please like us and follow us on Facebook. All major office changes and updates are always posted to Facebook. Our website also has the links to check on your refunds, as well as other forms and updates.

**Next season appointments**

Next season appointments can be made in November. We have a better idea of our Family schedules then. This way the time also makes it on your organizer. If you pre-scheduled for 2022 tax returns you will be getting a call in November to get scheduled for 2023 tax return.

**December mailing**

We mail out the season’s organizers in December most are dropped in the mail by the 15th. Please keep us up to date on your address so these get to you in a timely manner.

**Standard vs Itemized deductions**

The standard deduction in 2022 for a single person is $12,950 for HOH is $19,400 and MFJ is $25,900. The itemized deductions are:

* medical over 7.5% of income
* state taxes (property, vehicle, sales, income) can not exceed $10,000
* mortgage interest paid
* donations both cash and items

Most people do not have enough to itemize and will take the standard deduction.

**Sold your primary residence.**

If you sold the house you have been living in for more then 2 of the last 5 years for less than 250K of gain (500K if MFJ) you will have no taxable income. We need the information on the sale and the purchase of the house you sold. We don’t need anything for the new house you purchased. You need to file Form 8822 change of address with the IRS and let us know of the address change.

**Receipts to keep**

You need to keep anything that you are able to deduct on your tax return. For most people that will be donations, medical bills, and school supplies.

**Need to send us something**

We have a secure portal that you can upload to. Please do not email us any attachments. There is a link on our website if you do not know your login you can submit it as a guest. We will take a look and give you a call or email back. During off season we will be checking this at least once a week.

 If you have any other questions we haven’t answered here please feel free to call us!

Sincerely,

Diane St. Sauver Christie L. Szabla

Diane St. Sauver, CPA Christie L. Szabla, MBA

Certified Public Accountant QuickBooks ProAdvisor

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