

Gittelman & Company Introduces Tax Preparation Congestion Pricing

Due to the unprecedented demand for tax preparation services, complexities associated with the tax law and tax preparation and the peak time deadlines imposed to complete these returns, Gittelman and Company will be implementing congestion pricing for the 2022 tax filing season.

Those clients that do not submit **“substantially all”** of their 2022 tax data and information by March 15, 2023, for those returns where tax extensions will not be filed, and by September 1, 2023, where extensions are filed, **will be subject to a fee surcharge of 35% of the base 2022 tax preparation fee.**

“Substantially all” means the submission of all information that is available to you on or before each deadline above.

Example 1, if a client has received all of their tax information but is missing a 1099 form from a brokerage account, the submission of all of the tax information, not including the missing 1099 form, before March 15, 2023 would satisfy the “substantially all” requirement above.

Example 2, if a client has received all of their tax information but is missing three Schedule K-1’s from partnerships and S corporations, the submission of all of the tax information, not including the missing Schedule K-1’s, before March 15, 2023 would satisfy the “substantially all” requirement above.

Clients have a number of means in delivering tax information to us:

1. Upload to the client source folder in our secure client **Smart Vault Portal (preferred)**
2. Upload files to a secure drop box we can access or as secure pdf attachments to an email
3. Send by USPS or overnight courier
4. Drop off at our Clifton NJ offices during our business hours
5. Drop off at our Clifton NJ offices after our business hours using our new drop box located in the front of our office

All information will be time stamped and you will be notified via email if the congestion pricing applies to you.

In addition to the above, as we have offered for many years, clients can also input their 2022 tax information using our secure e-organizer product or by including a completed tax organizer with the 2022 tax information submitted above.

Your cooperation in delivering your 2022 tax information is critical to assisting us with the preparation of your 2022 tax returns.

GITTELMAN & COMPANY, P.C.