BRISA Financial Services

Professional Accounting & Tax Services Since 1990

Authorized E - File Provider

Members NAEA, AICPA, PMI, NJDRB

George A. Campelo
P.O. Box 8
Perrineville, N.J. 08535
Tel: (800) 979-0090 / Fax: (732) 792-0341
Email: TaxAccServ@BRISAFinancial.com / Website: www.BRISAFinancial.com#

(January 12, 2024)

Tax Year – 2023

Treating Clients as Friends for 35 Years

We hope you and your families are healthy and enjoyed the holidays.

Flexible On-Line Appointment Scheduling

Don't Wait – The Appointment Calendar is Open
We Can Have Our Meeting Before You Receive All Documents
Choose Any Available Day or Evening Time That's Convenient for You
An Extension Will Be Filed at No-Charge if the Work Cannot Be Completed by the Deadline

Refunds Fast & Easy

E-file: Receive Refunds Fast Directly Deposited to Your Bank Account

Secure & Easy Way to Send Tax Documents

Easy Upload Via Our Secure Server, Fax, or U.S. Mail
NOTE: GO TO OUR WEBSITE TO DOWNLOAD THE INFORMATION WORKSHEET

Contactless Electronic Signature & Delivery

For Your Protection and to Expedite Processing:
-Electronic Filing Authorization is Signed On-line
-Your Tax Documents are Sent to You Electronically via Secure Transmission and/or via Mail Delivery Service with Signature Required

Our Services

Tax Return Preparation – Personal, Sole Proprietor, LLC, Corporation, Partnership
NOTE - 2024:
SERVICES TO CORPORATIONS AND MULTI-MEMBER LLC'S/ PARTNERSHIPS
WILL BE DISCONTINUED AFTER TAX YEAR 2023
HOWEVER, WE WILL CONTINUE TO SERVICE SOLE PROPRIETORSHIPS AND SINGLE MEMBER LLC'S
We Handle All States as well as US Citizens and Residents Living Abroad

Free Value-Added Services

No Charge for Filing Extensions or General Support,

Quarterly Estimated Payments

Analysis of Filing Married vs. Separate

Flexible Payment of Accounting Fees

Deducted from your Refund or Credit/Debit Card (Amex, Visa, MC, Discover)

ABOUT US

We have been in practice for 35 years perfecting the process of serving our clients virtually. Our extensive background covers a broad range of industries to serve our clients' needs throughout ALL states as well as those living abroad who may be required to file US tax returns. In addition, we utilize secure technology and operating methods to protect your information. Information is never shared unless you specifically authorize its release.

OUR APPROACH

We treat you as we would like to be treated, and your work is always performed with the same care and diligence that we give our own. Since everyone's situation is different, we conduct a thorough interview process with each client tailored to your specific needs. Our primary goal is maximizing refunds while ensuring the minimized risk of audit. And if an inquiry is ever received, we will help you analyze requirements and respond. We take the time to do it right. You are never rushed, and we never cut corners or take the "*one size fits all cookie cutter*" approach.

THE PROCESS

1. **BOOK AN APPOINTMENT –**
   - ✓ **Make an appointment that's convenient for you. Go to www.BRISAFinancial.com and select "Book an Appointment".**
   - ✓ **You will receive an appointment confirmation e-mail and a reminder text before the meeting.**
   - ✓ **CONSULTATIONS – Contact our office for an appointment. DO NOT BOOK VIA THE WEBSITE. Depending on the complexity of the matter, a fee may be billed.**
2. **BASIC INFORMATION TO SEND –**
   - ✓ **Send documents and information available prior to our meeting.**
   - ✓ **Include documents as shown on the Client Information Worksheet – Sections C.**
   - ✓ **Complete applicable sections of the Client Information Worksheet. The Worksheet is meant to help you identify potential income, deductions, and other relevant items.**
     Go to www.BRISAFinancial.com and select the tab – "2023 Kick-Off Letter & Worksheet". It is available as PDF or Excel formats.
   - ✓ **Send all documents via secure upload: Go to www.BRISAFinancial.com and select the tab – "Send Your Forms Securely".**
     Or mail: BRISA Financial Services, PO Box 8, Perrineville, NJ 08535/ or Fax: 732-792-0341.
   - ✓ **Provide a current copy of your driver's license, state id, or passport. This is a requirement to file.**
3. **OUR MEETING –**
   - ✓ **Meetings are via telephone. Multi-party conferencing is available to facilitate participation by family members who may be at different locations.**
4. **FILING TAX RETURNS –**
   - ✓ **Federal, State, and Local income tax returns are prepared based on all documents and information provided on the worksheet and other information discussed during our meeting.**
   - ✓ **When the tax return is completed, you will receive a request to electronically sign e-file authorization forms. Note that tax returns cannot be filed without your signature(s).**
   - ✓ **Tax returns are electronically filed (e-file).**
   - ✓ **Completed tax returns will be sent to you electronically via our secure server as a PDF file. For an additional fee, documents may be sent via FedEx or USPS with tracking and signature required.**
   - ✓ **We retain copies of your tax returns for three (3) years. Additional copies will incur a fee.**
5. **ACCOUNTING FEES –**
   - ✓ **Accounting fees are based on forms and schedules prepared. It is never based on your income, refund, or amount due.**
   - ✓ **A detailed invoice will be provided with your tax returns.**