



# The Bottom Line

Schedule Your Appointment Online  
[www.thebottomlineinc.net](http://www.thebottomlineinc.net)

JANUARY 2024

- Office in Roxborough
- Year round tax services
- Business consulting, growing your business, start-up plans and seminars
- Online Bookkeeping
- Payroll Services
- Business & Financial Coaching
- Walter M. Moyer, Tax Strategist
- New Tax Preparer Coaching

## Tax Season Appointment Hours

Appointments via Zoom or phone  
Wednesdays & Saturdays  
9am to 11am.  
To book appointment visit our website  
[thebottomlineinc.net](http://thebottomlineinc.net)

Facebook  
[www.facebook.com/TheBottomLineInc](http://www.facebook.com/TheBottomLineInc)

Phone  
215-238-0230

Fax:  
215-701-7538

## Small Business Coaching

As your small business coach, I will help you set goals with realistic benchmarks so you can measure your business's progress. We'll identify your strengths and how to capitalize on them. We'll work together to address your stumbling blocks and plan strategies to either get through them or work around them.

I have owned my own small businesses and rental properties for over 40 years. But even before then, my parents owned a business with ten employees. As soon as I could hold a dust rag in my hand, they put me to work. I literally grew up in a small business. As an accountant for over 35 years, I have dealt with many small businesses. I've seen success and failure. Prior to being an accountant, I worked as a counselor and therapist, and I am a non-denominational ordained minister. Combined skills with my 35+ years of experience I will help you on a personal, emotional, and practical level to start, grow and run your small business.

We can meet for one session (\$75) if you only have a few questions, or you can buy a block of five sessions for \$325. Each session is half an hour.

We can discuss the tax saving advantages of a small business. Where to market your business. How to grow your business. Where to get business loans.

Is this person my employee or a contractor? How can I save taxes by hiring my children? Can I write off my home? Car? RV?

What about Airbnb and short-term rentals?

How does a rental property save in taxes with a positive cash flow but a loss for tax purposes?

Want to become a tax preparer? We also offer new tax preparer coaching

Book your first session by going to <https://calendly.com/thebottomline>



*Flyer, the Tax Cat,*

## Save Money. Prepay Your Invoice

We are once again offering returning clients a discount on their tax prep invoice if they pay it by January 31, 2024.

The first week of January, you will be emailed an invoice. It will include our fee for your 2023 tax prep and a discount of 10%. If you haven't received your invoice by Friday, January 12th, email Carolyn ([theBottomLineInc.net@gmail.com](mailto:theBottomLineInc.net@gmail.com)) to make sure we have your current email address. Paying your invoice early not only saves you money, if you forget about your tax returns, we'll remind you and make sure you're in compliance.

\* Fee based on last year's returns. Any major changes may increase or decrease your tax prep fee

# The Bottom Line Deadlines

Keep track of these dates to make sure your tax returns are filed on time.

- **January 22** - All businesses and individuals who file 1099s for independent contractors should get us information so we can file the required documents by the January 31 deadline. **The IRS issues penalties for filing late 1099s.**
- **February 23** - All corporations and partnerships should send us tax documents and financial records for 2021 so we can file returns by the March 15 deadline
- **March 15** - Individuals and couples who give us all their tax documents by this date will have their returns done by the filing deadline. We still accept clients after March 15, but, depending on how complicated your taxes are, an extension may need to be filed.
- **March 30** - Last day of scheduled appointments
- **April 15** - Tax filing deadline for federal, state and local individual returns. All tax liabilities due must be paid today. **Our office closes at noon and will not reopen until May 6th. If you have questions about paying your taxes, make sure you ask them BEFORE the 15th**
- **October 15** - If you file an extension, your returns are due today, but if you owe any money, it's still due on April 15th

## Tax Updates

Standard Deduction Increase: \$13,850 for single filers. \$27,700 for married filing jointly. \$20,800 for head of household.

Tax brackets went up in 2023 to account for inflation.

### Scheduling Tax Appointments and Getting Us Your Tax Docs

It's easy to schedule Zoom or phone appointments. Go to <https://calendly.com/thebottomline> You'll see the dates and times available and can book your appointment right then or there. We also have some in person appointments for fully vaccinated clients. Contact Carolyn via email ( [TheBottomLineInc.net@gmail.com](mailto:TheBottomLineInc.net@gmail.com) ) or phone ( 215-238-0230 ) and she'll be happy to set you up with an appointment.

The fastest, most secure way to get us your tax documents and information is to upload them to our secure portal ( [thebottomline.securefilepro.com](http://thebottomline.securefilepro.com) ), but it's not the only way. Ask Carolyn to email you the how to video if you need help

You can fax them to us at 215-701-7538

Mail them to The Bottom Line, 4116 Houghton Street, Philadelphia, PA 19128

Or you can drop them off at the address above. We have a locked drop box on our porch, so you can come by at any hour convenient for you.

## 2024 Pricing

Tax prep fees for returning clients are the same as last year, unless there are significant changes. If you pay your invoice by January 31st, there's a 10% discount.

Bookkeeping, Bank Reconciliation, Receipt tallying.....	Bookkeeper \$45/hour, Accountant \$150/hour
Consulting.....	\$75/half hour
Small Business Coaching, Financial Coaching, Budgeting.....	\$75/half hour, \$325/5 sessions