



The Bottom Line

Schedule Your Appointment Online
www.thebottomlineinc.net

JANUARY 2023

- 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

Tax Season Appointment Hours

Appointments via Zoom or phone

Wednesdays & Thursdays
1:30pm to 4:10pm

Saturdays
(starting in February)
10am to 3:20pm

Contact Carolyn about in office appointments

Website
thebottomlineinc.net

Facebook
www.facebook.com/TheBottomLineInc

Phone
215-238-0230

Fax:
215-701-7538

Identity Theft Protection & Audit Protection Included with Your 1040

For the second year in a row, The Bottom Line is partnering with Protection Plus to provide our clients with Audit Protection and Identity Theft Protection.

All taxpayers who file their individual tax returns with us have complete access to our expert tax audit defense team. In the unlikely event you receive a tax notice from the IRS or State, our Protection Plus audit defense team will provide up to \$1,000,000 in services to find a resolution.

Protection Plus will assist with recovering your identity after an identity theft incident. After notification of an incident, you will be assigned a Privacy Advocate who will assess the severity of the situation and take immediate action to begin the identity restoration process.

Save Money by Paying Your Invoice Early

We are once again offering our returning clients a discount on their tax prep invoice if they pay it by January 31, 2023.

The first week of January, you will be emailed an invoice. It will include our fee for your 2022 tax prep and a discount of 10%.

If you haven't received your invoice by Monday, January 9th, 2023, email Carolyn (theBottomLineInc.net@gmail.com) to make sure we have your current email address.

Paying your invoice early not only saves you money, it also lets us know you're a returning client. If you forget about your tax returns, we'll remind you and make sure you're in compliance.



Walter Moyer
Accountant

Flyer, the Tax Cat, is ready to look into her crystal ball and predict your refund

The Bottom Line Deadlines

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

- **January 20** - 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 24** - 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 31** - Last day of scheduled appointments
- **April 15** - **Our office closes at noon and will not reopen until May 2nd. If you have questions about paying your taxes, make sure you ask them BEFORE the 15th**
- **April 18** - Tax filing deadline for federal, state and local individual returns. All tax liabilities due must be paid today.

Watch us on YouTube

Subscribe to our YouTube channel at <https://www.youtube.com/@thebottomlinefinancialservices> where we post videos on small businesses, taxes, and other financial matters.

Find us on Facebook (<https://www.facebook.com/TheBottomLineInc>) and Twitter (<https://twitter.com/BottomLinePA>)

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) or phone (215-238-0230) and she'll b e 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), but it's not the only way.

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.

Get us all your tax documents a week before your appointment and we can have the preliminary work on your returns done for you chat with Wally

2023 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, \$300/5 sessions, \$500/10 sessions