

**WE MOVED: Right down the Hall to suite 316. Same Building.**

**Important Notice:**

**The IRS will NEVER call, text, or email you. Should you receive a letter via the US mail, simply upload it to the portal or scan it and e-mail to us.**

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**Please note: Documents will NOT be returned at the end of the season.  
Kindly submit clear copies, email, or upload all tax documents to the portal. Thank you**

It's Tax Season again! We hope to find you and your family safe and healthy this tax season. Please note our [website](#) has been updated with a wealth of additional information, including links to the [SecureFilePro Portal](#), [IRS](#), state agencies and the CDC.

We will make every effort to honor a request to review your tax return with Ed O'Neill once we receive all documents. Appointments for Zoom or Teleconference will be honored by request. Please see our [Office Policy](#) in this newsletter for details.

Our SecureFilePro Portal Family is growing. Thank you to all who are enjoying the secure, quick and simple use of the SecureFilePro Portal. Simply call Ed O'Neill at 516.935.7771 or email us at [Office@EdONeillTaxes.info](mailto:Office@EdONeillTaxes.info) to request your SecureFilePro Link access.

Kindly note:

- ❖ **Please note: Documents will NOT be returned at the end of the season. Please do NOT send originals. Kindly email or upload all tax documents to the portal.**
- ❖ No need to submit original documents. Keep them for your records. Clear photocopies are acceptable.
- ❖ Clearly scan and upload or email all documents to one .pdf, if possible. The SecureFilePro Portal is the most efficient and safest method to process your [Tax Documents](#). The next best method is to email all [tax documents](#) to [Office@EdONeillTaxes.info](mailto:Office@EdONeillTaxes.info).
- ❖ Place phone numbers and email addresses on all [tax documents](#) sent via US Postal Service, Fed Ex, UPS, fax or dropped off in our lock box at our office in Westbury.
- ❖ All Direct Deposit information must be confirmed with a voided check each year.
- ❖ Please do not fax State IDs such as driver's licenses. The poor quality makes it illegible to process.
- ❖ Please do **NOT** submit receipts. Keep all receipts for your records. Simply submit a grand total of your expenses.
- ❖ Please do NOT cut or staple documents, this will delay the process.
- ❖ If leaving a message on our voicemail, please clearly state your name and telephone number.

Reminders:

- ☐ Please visit our website at [www.edoneilltaxes.com](http://www.edoneilltaxes.com) for a full [checklist of documents](#) required to process your tax return and [sample documents](#).
- ☐ Once your tax returns are complete - All E-file Signature pages signed and returned to us with payment (we accept most major credit cards) - our office will then E-file your tax returns with the IRS and State (if needed). Please note you are responsible to pay the IRS or state if monies are owed.

We sincerely appreciate your patience and understanding during tax season.

We value your business. Thank you for your confidence in Ed O'Neill Ltd.

Many happy returns,

*Ed*

Ed O'Neill Ltd.



## **Dos and Don'ts Tips to Preparing Your Taxes**

**Please note: Documents will NOT be returned at the end of the season. Kindly email or upload all tax documents to the portal.**

- ☑ Do submit **all** information needed to complete your tax return by [SecureFilePro portal](#), email, mail-in, fax, or drop-off at the same time. Omission of pertinent information may cause delays in processing or an incomplete tax filing. It may also result in refund delay and/or IRS or state audit. Please see our website at [www.EdONeillTaxes.com](http://www.EdONeillTaxes.com) for a checklist of required documents and sample documents.
- ☑ Do provide a valid, current, clear and legible copy of **State Issued Identification** (such as a state issued driver's license-both *front and back*) for Taxpayer and Spouse (if applicable). Driver's license is required **every year**. A copy of the NYS Driver's license requirement policy is attached to this newsletter.
- **Don't** fax your state issued identification as the poor quality makes it illegible to process.
- **Don't** send originals; Keep them for your records. Clear photocopies are acceptable.

Please note: **Documents will NOT be returned at the end of the season. Kindly submit all tax documents via email or upload to the portal.**

- ☑ Do submit Form [1098T](#), tuition bills or a transcript from the Bursar's Office to qualify for the **college tuition credit**.
- ☑ Do submit a voided check, **required each year**, for you to receive a refund directly deposited in a specified account.
- ☑ Do complete the pertinent documents in this newsletter and submit them with **all** your tax documents. We must receive the [signed Letter of Engagement](#) and [completed Client Information Form](#) and all tax documents in order for us to prepare your tax return or visit our website at [www.edoneilltaxes.com](http://www.edoneilltaxes.com) to download the required documents.
- ☑ Do advise us of any change of address, any change in marital status (Single, Newlywed, Separation, Widow or Divorce), any change of dependents (New Baby or a Child claiming themselves). If you had a baby in 2023, Congratulations! Please submit the child's name, social security number and date of birth.
- **Don't** cut documents. This will only delay the process.
- **Don't** staple documents. This will only delay the process.
- **Don't** submit receipts. Keep all receipts for your records.
- ☑ Do submit a grand total of your expenses.
- ☑ Do feel free to provide clear and legible copies. Originals will **NOT** be returned.
- ☑ Do clear your voicemail box so that we may leave a message, if necessary.
- ☑ Do leave your phone number when leaving a message.
- ☑ Do scan to one .PDF, if possible, when submitting documents via email or portal.
- ☑ Do feel free to visit our website [www.edoneilltaxes.com](http://www.edoneilltaxes.com). It provides a wealth of information. Thank you

We appreciate your cooperation and assistance. Thank you.

Many happy returns,

*Ed*

Ed O'Neill Ltd.

1400 Old Country Road, Suite 303, Westbury, NY 11590



[www.EdONeillTaxes.com](http://www.EdONeillTaxes.com)  
[Office@EdONeillTaxes.info](mailto:Office@EdONeillTaxes.info)



516.935.7771



516.822.6704

## Client Information Sheet

Please help us better serve you. Kindly complete and submit with all your tax documents. Thank you.

Name(s) on Tax Return \_\_\_\_\_ Spouse \_\_\_\_\_  
Last Name, First Name

Street Address \_\_\_\_\_ Apt # \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Daytime Phone \_\_\_\_\_ Spouse Daytime Phone \_\_\_\_\_

Evening Phone \_\_\_\_\_ Spouse Evening Phone \_\_\_\_\_

Cell Phone \_\_\_\_\_ Spouse Cell Phone \_\_\_\_\_

Date of Birth \_\_\_\_\_ Spouse's Date of Birth \_\_\_\_\_

Occupation \_\_\_\_\_ Spouse's Occupation \_\_\_\_\_

Email Address \_\_\_\_\_ Spouse's Email Address \_\_\_\_\_  
(required for E-Filing)

Have you moved in the last year? ..... NO YES

Are there any new dependents? ..... NO YES

Are there any dependents you are no longer claiming? ..... NO YES

	Primary		Spouse	
Did you collect NYS unemployment in 2023? .....	NO	YES	NO	YES
Have you traded any cyber currencies? .....	NO	YES	NO	YES
Have you (or an entity of which you are an owner) been convicted of an offense, defined in New York State Penal Law Article 200 or 496, or section 195.20? (REQUIRED FOR NY IT-201/203-ATT FILERS) .....	NO	YES	NO	YES
Would you be interested in being contacted by our Financial Advisor, Ed O'Neill Jr. regarding a post-tax season financial review?.....	NO	YES		

How would you like your tax return sent to you when completed? *Portal / E-mail*

Would you like a review session after your tax return is complete?.....NO YES  
If yes, please indicate meeting preference.....Zoom / Teleconference

**Kindly complete and submit this document with a copy of a voided check, clear copy of the front and back of your driver's license and your spouse's driver's license along with the Letter of Engagement**

**Please note: Documents will NOT be returned at the end of the season.  
Kindly submit clear copies, e-mail, or upload all tax documents to the portal. Thank you**

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**Please do not cut or staple documents.**

**Do NOT send original documents.**

**Keep them for your records.**

**Clear Photocopies ONLY please.**

## CONSENT TO DISCLOSURE OF TAX RETURN INFORMATION

As a year comes to a close, I would like to thank you for your trust in me as your Accountant. The relationship we have built is truly something I am very grateful for. Helping you navigate the complexities of the tax code and keep more of the money you have earned is incredibly rewarding. But there may be more we can plan together.

As you may know, I have over 20 years of experience in multi-generational wealth management helping families develop sound retirement strategies and achieve financial well-being in all stages of their lives. Whether you are in retirement or preparing for retirement, seeking education, financial planning or looking for investment advice, I can help identify your needs to help you achieve your goals and dreams. I am an independent financial advisor with Cetera Financial Specialists LLC.

What sets me apart from most financial advisors is my extensive expertise as a tax professional. I would like to meet with you to discuss potential tax strategies that can reduce your tax liability and enhance your overall financial position. Please call 516-935-7771 to schedule a meeting.

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot disclose your tax return information to third parties for purposes other than the preparation and filing of your tax return without your consent. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution.

You are not required to complete this form to engage our tax return preparation services. If we obtain your signature on this form by conditioning our tax return preparation services on your consent, your consent will not be valid. If you agree to the disclosure of your tax return information, your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature.

If you would like Ed O'Neill Ltd. to disclose your tax return information to EON Wealth Management, please check the corresponding box for the service in which you are interested, provide the information requested and sign and date your consent to disclosure of your tax return information.

I authorize Ed O'Neill Ltd. to disclose to EON Wealth Management that portion of my tax return information for 2023 and future tax returns that is necessary for EON Wealth Management to contact me.

If you approve use of your tax return information by Ed O'Neill Ltd. for a term of one year or (duration of consent) \_\_\_\_\_ years, please sign below.

Taxpayer Signature \_\_\_\_\_ Spouse's Signature \_\_\_\_\_

Print name(s): \_\_\_\_\_ Date: \_\_\_\_\_

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email at [complaints@tigta.treas.gov](mailto:complaints@tigta.treas.gov).



## 2023 PERSONAL LETTER OF ENGAGEMENT

Dear Client:

Thank you for choosing Ed O'Neill Ltd. to assist you with your 2023 taxes. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide.

We will prepare your 2023 federal and state income tax returns. You "the client" must provide the information needed to prepare complete and accurate returns. We may ask you to clarify some items but will not audit or otherwise verify the data you submit. An Organizer will be provided, if needed, to help you collect the data required for your return. Please notify us if an Organizer is needed, and we will promptly email it to you.

We will perform accounting services only as needed to prepare your tax returns. Our work will not include procedures to find defalcations or other irregularities. Accordingly, our engagement should not be relied upon to disclose errors, fraud, or other illegal acts, though it may be necessary for you to clarify some of the information you submit. We will inform you of any material errors, fraud, or other illegal acts we discover.

The law imposes penalties when taxpayers underestimate their tax liability. Please call us if you have concerns about such penalties.

Should we encounter instances of unclear tax law, or of potential conflicts in the interpretation of the law, we will outline the reasonable courses of action and the risks and consequences of each. We will ultimately adopt, on your behalf, the alternative you select.

Our fee will be based on the forms required at standard billing rates plus out-of-pocket expenses. Invoices are due and payable upon presentation. To the extent permitted by state law, an interest charge may be added to all accounts not paid within thirty (30) days.

You should secure your tax records, along with all supporting documents, canceled checks, etc., as these items may later be needed to prove accuracy and completeness of a return. We will retain copies of your tax returns for four years, after which these documents will be destroyed.

Our engagement to prepare your 2023 tax returns will conclude with the delivery of the completed returns to you (if paper filing) or your signing, and the subsequent submittal, of your tax return (if e-filing). If you have not selected to e-file your returns with our office, you will be solely responsible for filing the returns with the appropriate taxing authorities. Review all tax-return documents carefully before signing them.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please print and sign the enclosed copy of this letter in the space indicated and return it to us.

We appreciate your confidence in us. Please call if you have questions.

Sincerely,



Edward O'Neill

(Both spouses must sign for preparation of joint returns.)

Taxpayer Signature **X** \_\_\_\_\_ Spouse's Signature **X** \_\_\_\_\_

Please Print Name(s) on Tax Return \_\_\_\_\_ Date \_\_\_\_\_



## Office Policy

Welcome:

Ed O'Neill Taxes Ltd appointment process is as follows:

- ❖ Phone appointments are always available.
- ❖ Virtual appointments through zoom are available.
- ❖ In-Person appointments are limited. We will make every effort to accommodate your request **once all tax documents have been received and processed.**

Please submit **all** tax documents using one of our convenient methods:



**SecureFilePro Portal** – If you need an account, simply call us at 516.935.7771 or email us at [Office@EdONeillTaxes.info](mailto:Office@EdONeillTaxes.info) requesting access and we will email you a link for you to establish an account. Kindly scan all documents to one (1) .pdf, if possible, when uploading.



**Email** – [Office@edoneilltaxes.info](mailto:Office@edoneilltaxes.info) -- Kindly scan all documents to one (1) .pdf.



**United States Postal Service** -- Please remove documents from envelopes. Do not cut or staple documents. No need to submit original documents. Keep them for your records. Clear photocopies are acceptable.



**UPS** -- Please remove documents from envelopes. Do not cut or staple documents. No need to submit original documents. Keep them for your records. Clear photocopies are acceptable.



**Federal Express** -- Please remove documents from envelopes. Do not cut or staple documents. No need to submit original documents. Keep them for your records. Clear photocopies are acceptable.



**Fax** – 516.822.6704 (Please do not fax State IDs such as driver's licenses. The poor quality makes it illegible to process). Feel free to use one of our other document submissions methods.

As a matter of courtesy and precaution, please do not come to the office for any reason if you have a cough, fever, cold or any flu-like symptoms. We will make every effort to ensure your taxes are prepared in a timely manner.

We look forward to serving you and hope this tax season brings you good health and happy returns.

Sincerely,

*Ed*

Office of Ed O'Neill Ltd.





**Department of Taxation and Finance** - <https://www.tax.ny.gov/pit/efile/individual-driver-license.htm>**Driver license requirement for taxpayers**

If you use software to prepare your (and your spouse's, if applicable) personal income tax return, New York State **requires** you to include your driver license or non-driver ID information on the return. This applies to both you and your spouse. You must enter the information each tax year as New York State does **not** allow the retention of driver license information by tax preparation software.

This requirement applies to driver licenses or non-driver IDs from **any** state.

You must provide the following information from your (and your spouse's, if applicable) driver license or non-driver ID:

- the driver license or non-driver ID number.
- the issuing state.
- the issue date.
- the expiration date; and
- the first three characters of the document number (for New York State-issued licenses and non-driver IDs only).

If you or your spouse do not have a driver's license or non-driver ID, you can indicate that within the software to fulfill this requirement.

**IDs and documents****What we accept**

We accept information from your most **recent** driver's license or non-driver ID. Whether your ID is active or expired, we will accept the return.

**How to locate the ID and document number**

The document numbers for New York State driver licenses and non-driver IDs consist of either 8 or 10 alphanumeric characters (we only require the first three characters).

To view the standard placement of the ID number and document number on New York State-issued licenses and IDs, visit the New York State Department of Motor Vehicles at [Sample Photo Documents](#).

**Why we want this information**

We will use the driver license and non-driver ID information as verification to protect you from fraud and identity theft.

**Extensions**

If you do not have your information when you file your extension, you may check the *Did not provide ID* box. **However**, when you subsequently e-file your return, you **must** include your driver license or non-driver ID information.

**Compliance**

New York States requires you to provide this information for you and your spouse (if applicable).

**If you don't include your ID information**

We use your ID information to help validate your identity; if we can't validate you, your refund may be delayed.

**If you have an out-of-state ID**

As long as you are providing a valid out-of-state ID, you should not experience any processing delay related to your ID.

1400 Old Country Road, Suite 303, Westbury, NY 11590

[www.EdONeillTaxes.com](http://www.EdONeillTaxes.com)



[Office@EdONeillTaxes.info](mailto:Office@EdONeillTaxes.info)



516.935.7771



516.822.6704

## Address and Directions

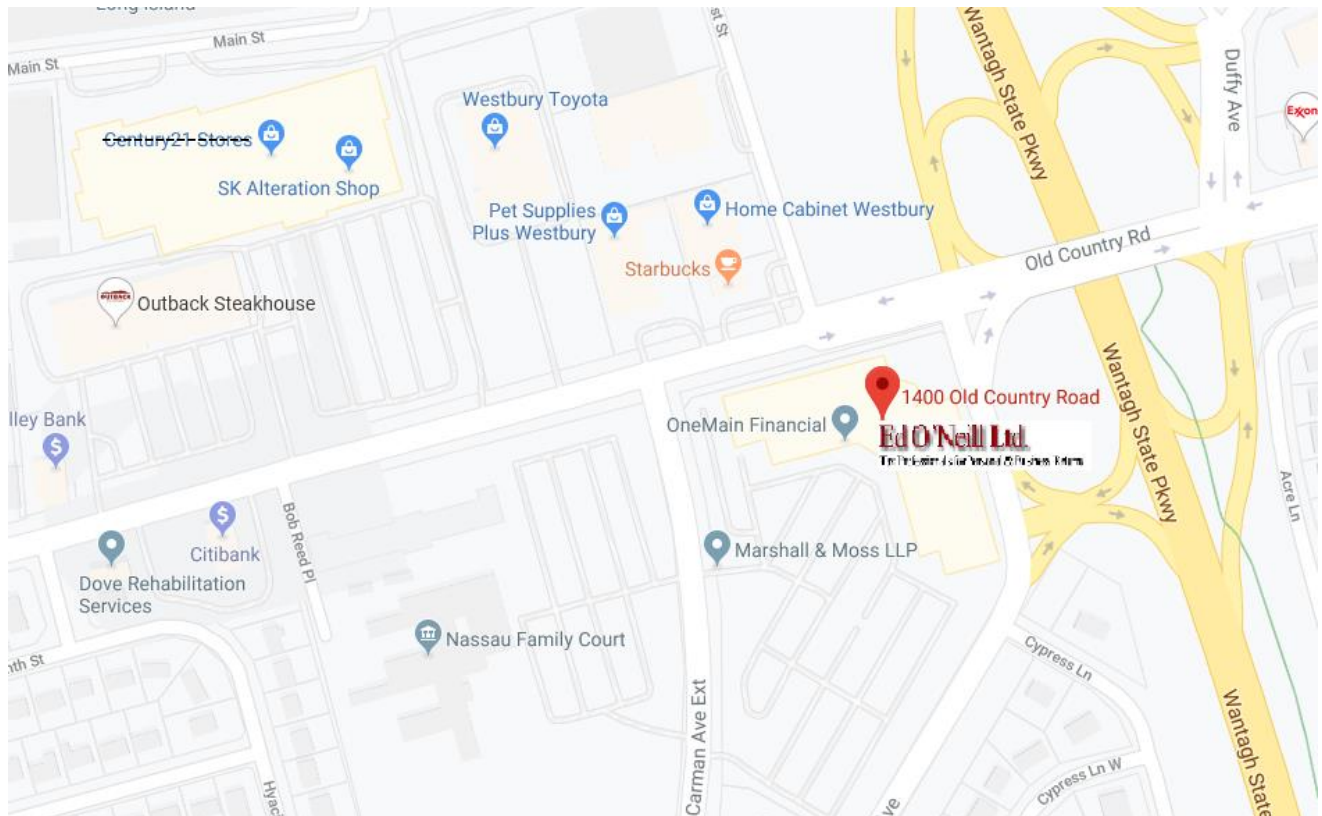
### Directions to Ed O'Neill's Office

1400 Old Country Road  
Suite 303  
Westbury, NY 11590  
516.935.7771

When using GPS please use Carmen Avenue Extension

**From the Northern State Parkway** - Northern State to the Wantagh Parkway South to exit W2 West (Old Country Road). At the 2<sup>nd</sup> traffic light make a left turn (Carmen Avenue Extension). Make 1<sup>st</sup> left turn into the first parking lot entrance.

**From the Southern State Parkway** - Southern State to the Wantagh Parkway North to exit W2 West (Old Country Road). Stay right on the exit ramp. Merge onto Old Country Road. At the 2<sup>nd</sup> traffic light make a left turn (Carmen Avenue Extension). Make 1<sup>st</sup> left turn into the first parking lot entrance.



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