



January 1, 2024

Dear Client:

The income tax filing season is approaching once again!

You should start receiving various tax documents (W-2s, 1099s, 1098 forms, etc.) during the month of January, and be on the lookout for envelopes marked “Important Tax Documents.” I am enclosing a Tax Organizer for your convenience, which can help you in gathering and organizing your tax forms. *If you prefer a personal tax organizer, complete with prior year numbers, I can e-mail you a copy, if you e-mail a request to bigbeartaxlady@gmail.com.*

For those of you who itemize deductions and/or have business expenses, please go to my website at www.bigbeartaxlady.com to download worksheets for your convenience. If you need additional forms or do not have access to a computer, please contact me at the above number, and I will send you worksheets as quickly as possible.

This year, as in the prior year, I am including the “Audit Protection” package, which will provide up to \$1 million of services to resolve notices, inquiries and/or audits, as well as provide you with Identity Theft restoration.

Just like the prior years, you can drop off your tax papers at my drop-off office at the UPS Store in the Village. Just hand them to the staff and request they go to the “Big Bear Tax Lady.” They are open Monday through Saturday, and I will be checking in daily for tax documents. Once completed, I will contact you, and will make arrangements to get it to you.

If you choose the paperless route (which the IRS & states are encouraging), you can scan and e-mail me your tax documents at bigbeartaxlady@gmail.com.

If you have any questions while you’re putting your papers together, please don’t hesitate to contact me. My goal is to save you time and taxes! Thank you again for your business.

Sincerely,

Myriam Mourani, MBA, RTRP
Big Bear Tax Lady
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