



Your Octo Tax Guide:

Keeping Your Finances Under Control
with Eight Tentacles of Expertise



Your Ultimate Guide to a Smooth and Stress-Free Tax Season:

Wow, 2023 was an amazing year for FlexKeeper as we crushed the tax filings for the year.

Not only were we able to file over 500 returns, we grew the business substantially.

With this in mind, we look forward to 2024 and anticipate that we will be even busier. Now, some of you may be concerned that we won't take the same time or effort with a growing business, but this simply isn't the case! We value each one of our clients and hope that as we get more organized and productive to get your tax returns done, that you as our client will assist us with things that we will need to get your return done timely and accurately. Please review the following specifics so you know what to expect for this coming season.

Availability:

For our legacy clients, most of you were used to night and weekend appointments. While we will still have these available (by special request), we will now be operating under more normal business hours, Monday - Friday, 9 am - 5pm. We have provided my Calendly link along with an outline of my schedule. If you would like to book an in person, Teams or Zoom call, please feel free to do so. You can also call or text me to drop off your forms. For those of you who don't want to upload your documents, but aren't in close proximity to our home office, you can mail your forms to the following address:

Jason Plett C/O EliteEA's dba The Flexkeeper
1025 Gateway Blvd #303-337 Boynton Beach, FL 33426

Upload Documents:

As I mentioned previously, you will all be receiving a link from Intuit to upload your documents to our secure website. We have also implemented a new accounting software called Financial Cents and we have the ability to use this as well to get your tax documents. In some cases, our new accounting manager Fahad Ahmad will be reaching out to you with this link to upload your documents. This is also a very secure and efficient way to get us your documents and can be less frustrating than ProConnect. Let me know if you have any questions about this option or any concerns about getting us your documentation.




JASON PLETT
CFO & CPA

[Schedule a call here!](#)

I look forward to connecting with each of you again and I thank you for your continued trust and confidence in my services.

Please do not hesitate to call, text (561-255-3219) or email me (jason@theflexkeeper.com) with any questions or concerns.

 561-420-0840

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