

Tax Season 2024

January 2024



AMERICANEXPAT
TAX SERVICES



Welcome to 2024

We hope you and your loved ones had a wonderful holiday season! As you know, with the holidays comes the new year; and that means it's time to prepare for the next Tax Season.

Our Intake process is largely the same as last year, but we highly recommend reviewing the information below to ensure a smooth experience.

Ready to get started [Click here](#)

Have you had significant changes? Let us know ASAP!

If you've had any of the below changes, we want to talk to you about what it means for your filing obligations and possibly our pricing moving forward to help you plan accordingly. You can set up an appointment by visiting our website. There is no charge for an appointment to review changes for our returning clients.

Possible changes from last year that may impact next year's tax filing including (not limited to):

- Had a child
- Bought or sold a house
- Co-signed on a home for a relative or friend
- Got married or divorced
- Started a business
- Had any significant expenditures (real estate, tuition, renovations, medical)
- Moved to a different country
- Exercised Stock Options

Follow these steps to set up your appointment to discuss your tax changes:

1. [CLICK HERE](#) to be taken to our scheduling service
2. Select the option “B: I am an AET client/returning client”
3. Depending on your situation, select either “Returning Customer Set up - Individuals with Tax Changes” or “Returning Customer Set up - Entities with Tax Changes”
4. Pick a time and answer the short questionnaire- and that’s it!

Watch your email for your Tax Season 2024 Engagement Letter

Your engagement letter will be arriving within the next week via email from Ignition, our proposal management software. Please keep an eye on your junk/spam folders. Once you review the proposal, you will be able to sign it digitally through Ignition and will be moved through steps to make your deposit. Your proposal was created by referencing your previous engagement, if there are no other changes. As soon as you’ve signed your engagement letter and paid your deposit, you can access your Client Axxess Portal from last year for document sharing. You will then begin working with our CSR (Customer Service Representative) team to gather any documents that may be needed to prepare your file.

Start preparing your documents for your 2024 taxes

High priority documents/subjects:

- Unemployment Compensation
- Information about Telecommuting arrangements
- Virtual Currency or Cryptocurrency
- Move or working in more than one state or country
- Form 1099-K
- Party to a Bare Trust
- Affected owners of Canadian residential property

US Filing Deadlines

- April 15, 2024 – Individual tax filing (or extension) deadline
- June 17, 2024- Expat filing deadline (or to file for an October 15 extension)
- October 15, 2024- Deadline for FBAR and if you requested an extension
- December 16, 2024- final individual tax deadline if you requested a special extension

Canada Filing Deadlines

- April 2, 2024 - T3 Trust returns
- April 30, 2024 – Individual tax filing deadline
- June 17, 2024- Deadline for Self Employed & UHT returns

Ready to get started - [Click here](#)