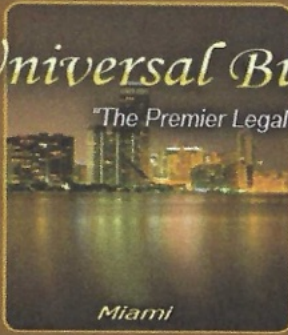


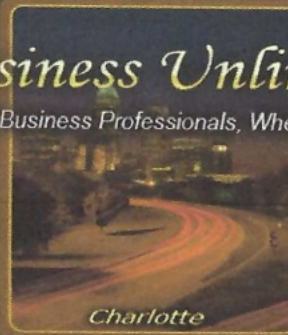
Atlanta

## Universal Business Unlimited

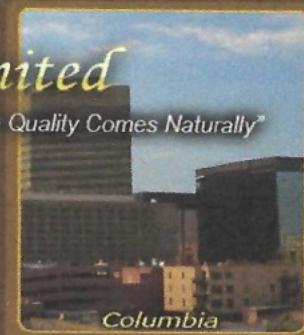
"The Premier Legal & Business Professionals, Where Quality Comes Naturally"



Miami



Charlotte



Columbia

124 South Main Street, Suite 1B, Jonesboro, GA 30236 • P.O. Box 1343 • Jonesboro, GA 30237  
[www.universalbizunlimited.com](http://www.universalbizunlimited.com)

Phone: 770-681-0944 • Toll Free : 1-877-793-2602 • Fax: 770-473-9895 • EFax: 803-693-0303

## **UBU TAX PROFESSIONALS ELITE TAX CENTER**

**TAX ORGANIZATION AND TAX PREPARATION  
TAX YEAR 2023**

**INFORMATION AND CHANGES**



**TAX SEASON 2024 IS HERE.**

**EMAIL: [UBUTAXES2023@UBUTAXPROS.COM](mailto:UBUTAXES2023@UBUTAXPROS.COM)**



## EXISTING UBTPE CLIENTS AND ALL NEW CLIENTS

Happy New Year and Upcoming 2024 Tax Season for Tax Year 2023! UBU Tax Professionals Elite wish to express our sincere thanks and appreciation to all of UBUTPE's loyal clients throughout the United States who continue to be a part of the UBU family the last 16 years. We are ready for Tax Year 2023 and stand ready to serve you efficiently and effectively to help you legally "Maximize Your Tax Dollars."

UBU Tax Professionals Elite ("UBUTPE") had a successful Tax Year in 2022 and prior years, on behalf of our clients. We were efficient, focused and most of all, welcomed a phenomenal success ratio with our client returns. Tax Year 2023 begins in a few weeks, and we believe you will benefit most by preparing EARLY (NOW!) UBUTPE is a subsidiary of Universal Business Unlimited, Inc.'s Nationwide One-Stop Business and Consumer Service Center (A Name You Can Trust), now located in Georgia, Florida, South Carolina. We are a National Corporation in Three (3) Locations, and in-house and online business that services all 50 states. UBU Tax Professionals Elite ("UBU Tax Pros") through Universal Business Unlimited, Inc. are full-service Tax Centers, and Electronic Filing Originators (EROs) with the IRS. UBUTPE are available to assist you all year long with your tax needs.

We offer Fee-Collect for client convenience through Santa Barbara Bank, a trusted name with the IRS to avoid advance payment of Preparer Fees. For Prior Year and Paper Tax Returns, no Fee-Collect is available. However, UBU now accepts Mastercard and Visa for Prior Year Fees, but a 3% convenience fee will be added.

## TAXPAYER ALERTS – EITC AND CHILD TAX CREDIT

If you ever receive a letter from the IRS, please do not be alarmed. It does not mean you did anything wrong. Check the mailing date and *Immediately contact your Tax Preparer first*, for proper guidance and assistance. Email the letter immediately to [ubutaxes2023@ubutaxpros.com](mailto:ubutaxes2023@ubutaxpros.com). Look at the date on the letter and know you have 30 days to disagree, or contact the IRS and request additional time to respond. If you have Tax Protection, which can also assist with documentation preparation. Do not panic. UBUTPE will assist with helping you expedite the process.

An inquiry from the State is just that. It is tricky and confusing when they indicate they have changed your return. It simply means to send over the information that is requested so they can release your State Return. If you delay and do not send what is requested, the State will usually hold your State Refund. Again, do not be overly concerned, but respond quickly and Contact your Tax Preparer first to make them aware.

## Tax Year 2023 - IRS Begins Accepting Returns January 29, 2024

We look forward to serving you again this year at "UBU Tax Professionals Elite". If you have any questions or concerns, please do not hesitate to contact our offices at the following locations:

Georgia – Corporate Office: Phone: 770-681-0944 Fax: 770-473-9895 E-Fax: 803-693-0303  
Florida – Satellite Office: Phone: 305-586-8316 Fax: 770-473-9895 E-Fax: 803-693-0303  
S. Carolina – Satellite Office: Phone: 877-793-2602 E-Fax: 803-693-0303 E-Fax: 803-693-0303  
GA Cellulars: 470-526-7555 / 404-396-2537 FL Cellular: 305-586-8316 / 305-812-5656



## UBU TAX PROFESSIONALS ELITE EMAILS

Tax Center-Send Docs: [ubutaxes2023@ubutaxpros.com](mailto:ubutaxes2023@ubutaxpros.com)  
Employment: [hiring@ubutaxpros.com](mailto:hiring@ubutaxpros.com)  
Preparer Inquiries: [gmayo@ubutaxpros.com](mailto:gmayo@ubutaxpros.com)  
UBU Services: [gmayo@universalbizunlimited.com](mailto:gmayo@universalbizunlimited.com)

The Internal Revenue Service announced that the nation's 2024 Tax Season will begin on **Monday, January 29, 2024**. This is the official date the IRS begins accepting filed returns. Please Do not be misled by false information that your Tax Filings are being accepted by the IRS earlier than the designated date issued by the Internal Revenue Service. UBU reminds taxpayers that, based on the Path Act, the IRS cannot issue refunds claiming the Earned Income Tax Credit (EITC) and the Additional Child Tax Credit (ACTC) before February 15, 2024. While the IRS will process all returns when received, it cannot issue related refunds before February 15, 2024. The IRS expects the earliest EITC/ACTC related refunds to be available in taxpayer bank accounts or on debit cards within approximately 6 weeks, **beginning March 11, 2024 or before that date**. We will keep you updated on any new developments.

### UBUTPE - 2023 TAX FILING UPDATE

UBUTPE began preparing and inputting returns as of **Monday, January 2, 2024** and will submit the returns to the IRS for receipt and processing once the IRS opens on **January 29, 2024**. Although the IRS will begin accepting both electronic and paper returns, paper returns will be processed in 6-8 weeks. The IRS strongly encourage Taxpayers to file their tax returns **electronically** and choose **Direct Deposit** for faster tax refunds. The nation's tax deadline this year is **April 15, 2024**.

**Returning and New UBU Tax Professionals Elite Clients for the 2023 Tax Year**, we welcome you and will continue to Maximize your Tax Dollars legally and assist you in preparing for your future. **Please call immediately to update any new addresses, emails and phone numbers in our System**. Our focus is to expedite the process, to ensure that you to receive your refund in a timely manner.

### For All New Clients' Early Registration (You will be one of the first to be accepted by the IRS):

- (1) Please visit UBU Tax Professionals Elite's website: [www.ubutaxpros.com](http://www.ubutaxpros.com) (Go to Contacts), and
- (2) Complete your Name, Address, Telephone number, Email Address, Name of Person who Referred You (If New Client), and type in the Service Request Box: " Name - 2023 Tax Preparation " and any additional information you would like UBUTPE to know about your 2023 Tax situation. **Text the contact number to alert us. Advise if you need prior years or multiple Returns prepared.**
- (3) Then go to Tax Forms. You should see a **UBU Tax Client Form** and **Tax Engagement Letter** which you will need to download, complete, sign, print and email to [ubutaxes2023@ubutaxpros.com](mailto:ubutaxes2023@ubutaxpros.com). Also complete a Non-W2 Income Statement and Schedule C Worksheet.
- (4) **To expedite the process, Email to [ubutaxes2023@ubutaxpros.com](mailto:ubutaxes2023@ubutaxpros.com) or Fax to (803) 693-0303. On Subject Line: Your Name – 2023 Tax Preparation. Name add'l doc We will place you in the System immediately, begin your tax preparation, awaiting any add'l tax documents to finalize the process as follows:**



**SEND REQUIRED IRS DUE DILIGENCE DOCUMENTS TO UBUTPE FOR TAX FILING**

1. 2023 Last paycheck stub (Will need your W-2)
2. 2023 W-2 Form for Employees
3. 2023 1099R Form for Retirement Deductions
4. 2023 1099 MISC Form for Self-Employed Individuals
5. 2023 1099G Form for Taxpayers who received Unemployment Insurance Benefits
6. 2023 Form 6419 to report Child Tax Credit Amount
7. 2023 1098 Form for Taxpayers who attended school
8. 2023 Health Insurance Marketplace Verification or Hardship Exemption Form
9. 2023 UBUTPE Form for Cash Non-W2 Wage Earners - Sign
10. 2023 UBUTPE Schedule C Business Expenses - Sign
11. A copy of your unexpired driver's license or State ID
12. A copy of your Social Security Card for Taxpayer and Dependents
13. For EITC Taxpayers, Immunization and School Records to verify Residency Requirement
14. 2023 Bank Statements, Credit Card or Bank Card Statements the last 12 months
15. Bank information, including Routing Number and Account Number for Account you wish your refund to be deposited in.
16. 2023 Invoices or Record of Income for Sole Proprietors requiring a Schedule C
17. Any and all Tax correspondence received for the 2023 Tax year from Jan – Dec. 2023
18. If you plan to itemize deductions, fax or e-mail all documentation relating to 2023 your Tax Preparer needs to see or review.

**Email to: [ubutaxes2023@ubutaxpros.com](mailto:ubutaxes2023@ubutaxpros.com). All Documents must be legible.**

**To Email Due Diligence Docs – Go to Pages 8-13 of your email: Place your Name and Tax Year 2023 in the Subject Line of e-mails) – Example: John Doe – 2023 Tax Documents. For subsequent emails, John Doe – “Describe the document” you are sending (i.e., Driver's License, etc.) You can find the same documents at [www.ubutaxpros.com/Tax Forms](http://www.ubutaxpros.com/Tax Forms) if that is easier.**

**Your secured, confidential personal information will be inputted immediately to place you in our System within 24 hours. You will be placed in “VIP Status Hold,” and expedited, while awaiting your W-2s, 1099s, or Non-W2 Income Form to complete E-filing. You may complete any additional information or provide remaining documents once they arrive.**

**Then call and schedule a telephone conference to finalize your Tax Preparation Needs. If you have a difficult or special situation, please alert us and call to schedule a phone appt. Don't Delay! UBU Tax Pros are here to assist you.**

**WHY USE UBU TAX PROFESSIONALS ELITE? “WE DO IT RIGHT THE FIRST TIME. WE ARE THE BEST AND STAND ABOVE THE REST!” YOU ARE MORE THAN A TAXPAYER TO US. WE TEACH YOU PROPER BOOKKEEPING ETHICS. WE ARE DETAILED AND CONSISTENT. UBUTPE TRULY CARE ABOUT YOUR FUTURE, AND FOCUS ON OUR CLIENTS' ONGOING SUCCESS! UBU TAX PROS ARE SEASONED TAX PROFESSIONALS WHOSE GOAL IS TO MAXIMIZE YOUR TAX DOLLARS LEGALLY. WE ARE HERE TO ANSWER QUESTIONS THE ENTIRE TAX YEAR. OUR PARENT COMPANY, UNIVERSAL BUSINESS UNLIMITED, INC. ALSO OFFERS A HOST OF OTHER BUSINESS, LEGAL, CREDIT AND BANKRUPTCY SERVICES TO HELP YOU OBTAIN A FRESH START IN THE NEW YEAR. CALL AND INQUIRE!**



### **EITC CREDIT**

Beginning in Tax Year 2016 - 2023, if you claim the Earned Income Tax Credit (EITC) or Additional Child Tax Credit (ACTC) on your tax return, the IRS must hold your refund until at least six weeks. In the past, the IRS has issued most refunds in less than 21 days (10 days or less, if paid by Direct Deposit). If you elect to receive a check, it could take 4 weeks or longer. Amended Returns will take up to 16 weeks or longer due to COVID-19 delays. However, UBUTPE will accommodate your requests. After the first initial deposit from the IRS in 2019, the normal refund time will be the same as usual.

Please keep in mind it is always possible, but not likely, that your tax return may require additional review and be delayed if you have dealt with any Advance Child Tax Credit, Identity Theft issues, Child Support or Student Loan issues, EITC Credit fraud or other unknown or undisclosed delays. It is our goal to legally "Maximize Your Tax Dollars" and "Do It Right the First Time," so please disclose any potential challenges you might be facing so we can help you prior to filing your 2023 Taxes. This is very important.

### **IRS IDENTITY VERIFICATION LETTER**

If you received an Identity Verification Letter Request from the IRS after filing your Tax Return, no need to panic. Simply follow instructions that also appear on our website at [www.ubutaxpros.com](http://www.ubutaxpros.com), call them and verify the information requested only. Do not volunteer information. This is not an audit. It is meant to properly identify the Taxpayer and combat fraud.

### **IRS MAIL AUDIT LETTER**

If you ever receive a mail audit letter, do not panic. It is no one's fault. Under the 2015 Path Act, the IRS randomly selects returns for verification. Most are "Head of Household" and "Schedule C." It is important that you keep all receipts during the year whether you think you need them or not, and swipe your cards in lieu of paying cash for expenses, to be prepared. If you chose Tax Protection Plus, simply contact the company and they will assist you. If you did not choose Tax Protection Plus, call UBU Tax Pros so that we may direct you further. Be sure to send a copy for your tax file. Though it is your choice, UBUTPE suggests that you accept Tax Protection Plus to safeguard you in the event of an audit, which is usually very unlikely.

**"REFERRALS" - WE ARE ASKING ALL OF OUR CLIENTS TO SEND US AT LEAST TEN (10) NEW PEOPLE WHO ARE IRS ACCEPTED AND THE IRS PAID A REFUND TO. YOU WILL RECEIVE A CHECK. THERE WILL BE OTHER SPECIAL INCENTIVES FOR IN THE 2023 TAX YEAR.**

Thank you for allowing UBUTPE to handle your all of your Personal and Business Tax and Business needs. UBU appreciates your continued patronage and support over the last sixteen (16) years. We look forward to serving your Tax Preparation, Organizational, Tax Resolution and/or Bookkeeping needs for Tax Year 2024, We are here to help you meet all of your financial goals for a successful future, to help empower your family. We look forward to Maximizing Your Tax Dollars in Tax Year 2023!!!

**UBU TAX PROFESSIONALS ELITE MANAGEMENT**



## **NEW TAX ALERTS FOR 2024**

### **NEW TAX INFORMATION FOR LLC AND CORPORATIONS BENEFICIAL OWNERSHIP INFORMATION**

The Corporate Transparency Act (CTA) is a law that requires many companies in the United States to report information about their beneficial owners to the Financial Crimes Enforcement Network (FinCen) starting from January 1, 2024. The purpose of this act is to increase transparency in unregulated companies and prevent criminals from hiding behind corporate structures.

Under the CTA companies must submit a beneficial ownership information (BOI) report to FinCEN, which includes information about the individuals who ultimately own or control the company. Companies that knowingly provide false or fraudulent beneficial ownership information or willfully fail to provide beneficial ownership information to FinCEN may face civil penalties of up to \$500 per day (up to \$10,000) or criminal penalties of up to 2 years in prison. This is an overview of information.

If you have further questions about the Corporate Transparency Act, it is recommended that you consult with a legal professional for more detailed information or the Internal Revenue Service. Taxpayers should be able to file this report directly. However, Tax Professions will provide those services for an additional fee for those Taxpayers who prefer not to file directly.

Remember, this is a new Tax Requirement. We will keep you apprised of any new developments.

Website: <https://www.fincen.gov/boi>

<https://boiefiling.fincen.gov/help>

### **PERSONAL SELF-EMPLOYMENT TAX FILINGS**

UBUTPE does file taxes for Self-Employed Individuals. You should be aware that business income is taxed at 15.3% Tax Rate by the IRS. State Tax withholding is 5.49% We recommend during the year that you contact the IRS and pay estimated taxes quarterly to assist you during tax time each year, but UBUTPE is here to assist you with your tax needs.

### **CORPORATE BUSINESS TAX FILINGS**

Corporate Business Tax Filings are due March 15, 2024. Not in the month of January.

**UNIVERSAL BUSINESS UNLIMITED, INC.**

**ADDITIONAL BUSINESS & LEGAL SERVICES**

- Also, please keep in mind that the New Year is a great time to reflect on your financial future. You can use a portion of your refund to correct and/or improve your finances and begin the 2024 New Year debt free, with a “Fresh Start” Chapter 7 Bankruptcy, or achieve a higher FICO score with our Credit Assistance Program, AND MANY MORE SERVICES.  
[www.universalbizunlimited.com](http://www.universalbizunlimited.com)
- UBU is also offering its Homebuyer’s Program for any clients that are interested in purchasing a home. We will expedite the process for you from beginning to closing. Our agent works for Keller Williams Partners.
- UBU’s National One-Stop Business & Consumer Service Center has helped thousands of people succeed and change their lives for the better. We will continue to empower our clients to achieve ultimate success and personal growth.
- UBU also offer services to assist with preparation of 501c(3) Tax Exempt Status for a competitive rate.
- MANY MORE SERVICES.

**Visit Universal Business Unlimited, Inc’s website:**

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

and submit a request at the Contacts Page, or call [404-396-2537](tel:404-396-2537) or [305-586-8316](tel:305-586-8316) for faster service.

**Visit UBU Tax Professionals Elite’s website:**

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