

LUCAS, MORELAND and MASTBROOK, INC.

Weekly Update



Tax Update

We placed 2024 Tax Organizers into your Portal earlier this month

If you did not set up a portal, we mailed a hard copy.

Please call or email us if you have not received your 2024 Tax Organizer and Engagement Letter.

As we advised in recent Tax Updates, IRS funding has been seriously slashed. This is negatively impacting return processing times and customer service.

We are seeing increasing delays obtaining tax refunds and significantly increased problems getting someone on the phone at Taxpayer Assistance; the states are in worse shape.

To mitigate delays' securing tax refunds and credit for tax payments, please Portal/Mail your signed Engagement Letter and make the required deposit via our LMM, Inc.

[website](#) so we may begin return processing as soon as possible.

The Portal is the most convenient and reliable delivery method for document exchanges. Call Lauren at (703-893-9320) or email (office@lmmtax.com) for help setting up your own secure Portal.

We are here to help you with all tax and financial matters. See Vince anytime for Retirement and Estate Planning.

Thank you and please, make at least one (1) referral this tax season.

Vince Lucas, CPA
President
[LMM, Inc.](#)
LBA, CPA and LGK, CPA

The information provided herein is for education only. It is not a recommendation to buy or sell any security, make any investment, or pursue a particular tax strategy. Current viewpoints are subject to change.



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