



General, but timely, thought provoking and motivating information for the clients, friends and families of Nagel CPAs, LLC.

We are currently seeking to fill two positions:

*[Director of Tax Planning and Compliance](#)

*[Mid-Level Tax Manager](#)

Follow the links above to our website for complete job descriptions.
Please email resumes with a cover letter to rlamar@nagelcpa.us

We're
Hiring!

Tax Season 2023: Much better

So, I was off a year.

I do not remember the person or context but early in 2022, I commented that the new year couldn't be any worse than 2021. After all, we had already survived two years of the Pandemic. Things had to get better. The response was: "what makes you so sure?"

In hindsight, my confidence must have been fully grounded in some of Greenspan's *irrational exuberance*. I was flat wrong.

Nonetheless, our new hires in the fourth quarter and investments in training and technology are proving to be helpful. 2023's tax season is off to a much better start.

Praise God, hallelujah!

Despite the smiles and good mood in the office, here's a few quick tips for the foreseeable future.

Secure Act 2.0

I read recently that there are 92 changes in retirement funding provisions in the 380 some pages of this act. One new element every three or four pages? No wonder some many accountants threw in the towel last year.

You will have questions as new provisions are better known. But, let us know what's on your mind.

You know what big advocates we are for taking advantage of these tax benefits while funding your future retirement. Move your own money from one account to another and take a tax deduction! It's that simple. Let us help.

[Click here for Dave Ramsey's Scoop on the Secure Act 2.0](#)

Speaking of retirement funding...

[Click here to read my most recent article on the 401k Plan published this month in the Rio Rancho Observer.](#)

We work closely with Third Party Administrators and fund custodians to help you and your employees make good funding and investing decisions. We can even be your Plan's Investment Advisors. There are no excuses for letting life pass you by with no nest egg for retirement. We are eager to help.

They are at it again!

More than 90% of our clients use Intuit Quick Books for their accounting software, in one form or another. You may not like the recent news about QB 2023 upgrades, but it is a fact of life in the business world. [Read here for more info on why you should upgrade soon.](#)

Call Michelle Skibyak, our QB Pro Advisor, for more info on how to easily upgrade.

Final thoughts on SVB?

[Click here for commentary from our colleagues at Capital Group.](#)

Welcome to Spring 2023, wind and all. Things are growing outside. I hope you and your business are too.

Thank you, for your loyal patronage.

Roger C, Nagel, CPA/PFS, CMA, CGMA

If you know someone that would benefit from the information provided in these newsletters please contact rlamar@nagelcpa.us, or call 505-898-2558 to add them to our subscriber list.



Visit our website



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