Clients and Friends,

Happy New Year! As we begin a new year, we want to take a moment to say thank you for your continued trust in us. Here is some important information as we begin the tax season.

As a valued client, you have access to a secure portal where you can safely store and retrieve your important financial documents anytime, from anywhere. Some of you may have already received it! We are encouraging all clients to use it! <u>For Individual Returns, the portal will list all the documents that you provided last year as a reference.</u> For new clients, check your spam. The email will say: "getting ready for tax time". If you are using quickbooks as your bookkeeping system, share a copy of your QBB with us (if using the QB online, you can add us as your accountant.

**For returning clients that are not utilizing the portal, you can request a PRIOR YEAR WORKSHEET by email. This worksheet includes all line items populated last year.

<u>What we need from you</u>

- Make sure you have **<u>ALL</u>** your documents before clicking "I think I'm done".
- Documents should be in summary format <u>with totals for each category</u>. We do not need to see receipts (for audits only).
- For new clients, you may use the attached checklist as a guide in gathering your information. (existing clients may request a prior year summary worksheet)
- Payment is due upon completion.

<u>What you can expect</u>

- Returns will be processed on a first come first serve basis. Please do not call us or email to confirm that we have received your information. We'll reach out to you with any questions or any missing information.
- You will receive an email with a draft of your tax return and the necessary E-Signature forms. Please carefully review everything and reply to the email before we proceed with filing your return. If you would like to set up a review meeting, please use the link below.

<u>Audits</u>

If an audit arises, you are responsible for providing the necessary documentation in response to the audit notice. You agree to hold us harmless with respect to additional taxes, penalties, or interest imposed on you by tax authorities resulting from the disallowance of tax deductions due to inadequate documentation. Fees will be based on time and complexity.

<u>Approximate Fees:</u>

Fees start at $350. This includes a review appointment before your taxes are filed. Extensive reviews will be charged accordingly. Fees are dependent on the quality and completeness of your records.

<u>Tax Return Status</u>

It is your responsibility to check the status of your return(s) at IRS.gov "Where's my refund?" or corresponding state website (i.e., NYS). We encourage you to set up an online account with the IRS. To make on-line payments, go to irs.gov/payments

Please remember that there are several life events that may impact your tax liability (Marital status, Birth of a child, income changes, if you buy/sell stocks/crypto, winnings, withdrawals, Sale of an asset, etc.) Also, be aware that older dependents (18+) can affect your deductions and ultimately your refund. Please contact our office for a consultation.

My business continues to grow. Zachary Hennessey, EA,CPA (Zach@vanderzeefinancial.com) will be here full time and Noah Quartararo, EA will be working remotely.

Any tax questions should be directed to us via email or phone. Please DO NOT text or message any important information to my cell phone, use email only. If you would like to set up a review meeting please use the link below.

Sincerely,

Dave

David P. Vanderzee, CLU, ChFC, LUTCF, RTRP

Attachment: Tax Prep Checklist

Filing dates:

Jan 15	Due date for 2025 4th quarter estimated tax payments (1040ES)
Jan 29	Filing season starts
Mar 16	Due date for Partnerships, multimember LLC's (1065), S Corps (1120S) and Trusts/Estates (1041)
April 15	Due date for Personal (1040), Sole Proprietorships (Schedule C), C Corps (1120) and to request

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To Book a Meeting

https://calendly.com/dave-vanderzeefinancial/new-meeting