

Kelley's Accounting & Tax Service, Inc.

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Dear Client, It's tax preparation time again!!

This letter is designed to give you the guidance for the information we need to prepare your **2025** Income Tax Return. **We strongly encourage you to mail in your tax return information or to drop it off at our front desk. Please include a copy of our worksheet with your tax information. We will be taking appointments on a limited basis.**

As the year winds down, the tax reporting forms begin to arrive and we want to remind you which ones we need you to accumulate and send to us with your tax information. The new Tax Bill this year means we will be applying the new deductions for seniors, tips, overtime and car loans where we can. **If you are a W-2 employee, make sure to provide us with any attachments to your W-2 this year so that we don't miss the tip or overtime deduction!**

We still need the annual information forms that are sent to you for tax purposes from banks, credit unions, etc. And we **strongly** request that you complete our Worksheet. As a reminder, here is a simple checklist:

- W-2 for wages W-2G for gambling 1099-Int for interest
- 1099-DIV for dividends 1099-B Brokerage SSA-1099 Social Security
- 1099-NEC for income 1099-Misc for income 1099-K for income
- 1099-R for retirement 1099-G ref & unemp 1095-A Marketplace Ins
- 1098-Int for mortgages 1098-T for tuition 1099-SA for HSA's
- K-1 forms from investments in S corporations or partnerships
- Form 5498 for IRA values IRA and Roth IRA contributions for 2025

Crypto-currency activity continues to increase, and we need to report all crypto activity. Our policy is that you must have a brokerage statement for the crypto activity. If you do not, we cannot prepare your return.

New credits for home improvements end this year and can provide you with tremendous tax benefits. If you installed a new furnace, A/C, boiler, heat pump, water heater, woodstove, windows, doors, insulation, solar or battery storage, please be sure to provide us with a copy of the invoice.

Similarly, if you bought a new electric or hybrid car in 2025, please be sure to provide that invoice copy and the dealer paperwork as well.

Many of you will benefit from the higher standard deduction on your Federal Tax Return and not itemize, but please fill out the itemized worksheet because the majority of you will benefit from itemizing on your State Tax Return.

If you have a business or rental property, please fill out the back page of the worksheet.

If you have a partnership or S-Corp, the due date for these returns is March 15th. Therefore, we need information to prepare these no later than March 1st.

You may drop off your tax information, **along with the completed worksheet, all necessary forms, and a copy of current Drivers License for all taxpayers,** and leave it with one of our staff. **We will begin Electronic Filing on the first day that IRS will start accepting returns, usually this date is mid to late January. We can prepare your return as soon as you have the information to us.**

Parking is available behind our office on our paved parking lot. Please come in our back door and go to our front counter.

Every year we are reminded how much we value your business, and we want to once again say thank you. Please call us with any questions.

We are a full service, year-round accounting firm, available to you when and if you need us for tax planning or tax problems all throughout the year. We have been in business for over 45 years and our staff is the same capable and qualified staff that you are used to dealing with in the past. We have had, and will continue to have, a reputation for accuracy, quality, and discretion.

Sincerely,
Kelley's Accounting & Tax Service, Inc.