MM Tax Service, Inc.

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2025 Tax Season Information

Please take the time to review this year's tax season information. This information will answer most general questions, explain our tax season process, and help you gather and submit tax information. If you have questions after reading this information, feel free to contact us at:

Email: admin@mmtaxinc.com | Call: (920) 437-4000

REQUIRED DOCUMENTS: The following items are required at the time you submit your tax documents:

- **Signed Individual Engagement Letter (**must be signed each year)
- **Completed Client Questionnaire**

These documents are available on our website along with optional organizers you can use. We have mailed these documents to all clients who have requested paper copies in the past. If we did not mail you copies and you would like us to, please contact the office.

Please include specific questions and all new or unusual circumstances when you submit your tax documents and we will contact you if we need more details when we start working on your tax return. To ensure that you provide all of your tax information, please review the documents you provided last year and make note of any documents that are no longer relevant.

DEADLINES: The deadline for filing individual income tax returns is April 15, 2026. We must receive all tax information and have substantially all questions answered by **March 20, 2026** to try and meet the individual deadline. This deadline is not for business tax returns or for those clients with complex tax returns or situations. These clients should submit their tax information as early as possible if an extension is not desired.

APPOINTMENTS: In-person meetings are very limited and are rarely necessary. In-person appointments are only available for new clients or for very specific situations that need to be discussed before we work on your return. Most tax questions can be answered over email; however, phone appointments can be requested to discuss questions or tax return results if needed. Please plan to mail, drop off or upload your tax documents and we will contact you with questions during the tax preparation process. Appointments are not available March 13, 2026 through April 15, 2026. Most tax planning should be addressed throughout the year instead of during the tax season.

STATUS UPDATES: Please avoid calling or emailing to ask about the status of your tax return or whether we need anything else unless we contact you. We do not review the tax information you submit until we start working on your tax return. We will always contact you when we have questions, or when your returns are completed and ready for review. Responding to check-in messages slow down our process. Thank you for your patience and trust.

EMAIL/MESSAGE RESPONSE TIME: Our normal response time is 2-3 business days. We may respond later if your question is not urgent or we may not respond until we are working on your tax return.

PREPARATION TIME: Tax returns are completed in the order that they are received. Most returns are completed in about 3 weeks after we receive all necessary tax documents and information. Timing may vary depending on our workload and other unrelated deadlines. We do not begin preparing your tax return until we have at least 90% of your tax documents. To help the tax return process run smoothly, please respond promptly if we contact you with questions.

<u>EXTENSIONS:</u> If your tax information is submitted after the March 23rd deadline, we will automatically file an extension for you. If you would like an extension but have not submitted any tax information, you must contact us directly. We cannot file an extension unless we hear from you. Please notify us promptly if you need an extension if you need us to estimate your tax due so that we can focus on completing tax returns before the tax deadline. We may also suggest that an extension be filed for complex or time-consuming tax returns so that more time can be spent on them.

<u>SUBMITTING TAX SEASON DOCUMENTS</u>**:** Please submit tax documents all at once rather than as you receive them. We understand that some items arrive later (i.e. brokerage statements, K1s). In this case, send what you have and keep us informed.

Tax information can be submitted via:

- <u>Mail</u>: 1600 Shawano Ave, Suite 124, Green Bay, WI 54303
- <u>Drop Off</u>: (note: main building is locked evenings and weekends)
  - no appointment needed but please **<u>call</u>** ahead to be sure someone is at the office
  - secure drop box located next to office door
  - slide envelopes under our locked office door
- <u>Secure Document Upload</u>: Upload PDFs through: https://www.encyro.com/mmtaxinc (please do not email us your tax documents)
  - After your upload is completed, a confirmation (highlighted in green) will temporarily show up indicating that your secure message has been sent. Please note that you will not receive an automatic email confirmation to let you know we have received your tax documents.

<u>TAX RETURN COPIES</u>: If you receive a digital copy of your tax return, please promptly download your copy for your files (the links expire after 14 days).

<u>REVIEW AND SIGN YOUR TAX RETURNS</u>: It is your responsibility to review your completed tax return and ask questions if you have any <u>before</u> signing**.** We cannot file your tax return electronically until an E-file Authorization is signed by you (and your spouse, if married). Please carefully review the summary letter and any additional information we send you with your return. We always provide clients with filing instructions, payment instructions, and refund or tax due information along with your copy of your return. If you have questions <u>after reviewing this information</u>, please let us know.

<u>FEES</u>: Due to rising software and operational costs, preparation fees for the 2025 filing season will generally increase by about 5%, possibly more for returns requiring additional time or complexity. Fees are based on the time required to gather, organize, prepare and file your tax return, the difficulty of the forms involved, and any extra time spent collecting information from you. Also considered is the degree of skill required, time limitations imposed on us by others, the level of cooperation by the client and the value of the services to the client. Tax preparation fees do not cover additional services requested by you, such as tax planning, projections, responding to notices* and research.
*We will review tax notices at no charge, but we will charge for any follow-up work due to client or IRS error.

<u>INVOICES</u>: When your tax return is finished, our invoice will be included with your copy of your completed tax return, a summary letter, and the E-file Authorization signature page. After you review your tax return, please sign the authorization and pay your invoice promptly. Payment options are listed on the invoice. We cannot deduct your tax preparation invoice from your bank account or from your tax refund.