MM Tax Service, Inc.

— Maria A. Migel, E.A. —

2024 Tax Season Information

<u>Submitting Tax Information/Documents</u>: Please submit your tax documents all at once rather than as you receive them. We normally do not start working on a tax return unless substantially all your information has been received (nor do we look at the documents you submit until we start working on your tax return). We do realize that in some cases you may have items that are not available until later (like brokerage statements or K1s). If that is the case, simply get us what you have and let us know which items are outstanding and when you might expect to receive them.

- Secure Upload: Upload your documents securely by uploading them through the link on our website at mmtaxinc.com or through this direct link: https://www.encyro.com/mmtaxinc
- Mail: 1600 Shawano Ave, Suite 124, Green Bay, WI 54303
- Drop Off
  - No appointment needed but call ahead to be sure someone is at the office, or
  - Utilize the secure drop box or put your documents in an envelope and slide them under our locked office door (no one except staff have access to the office)
    - The building is usually locked each night and on weekends.

<u>Appointments</u>: Please plan to mail, drop off or upload your tax documents and we will contact you with our questions. If you have questions or concerns about your tax return, please include <u>specific questions and all new or unusual circumstances pertaining to 2024</u> when you submit your tax documents, and we will contact you when we start working on your tax return. We are focusing on preparing and completing tax returns during this busy time, so in-person meetings are very limited and are only available for new clients or for certain situations that need to be discussed before we work on your return. No appointments will be available after March 14, 2025 through April 15, 2025. Please also keep in mind that tax planning should be addressed throughout the year as opposed to during the busy tax season.

<u>Preparation Time</u>: Tax returns are completed in the order that they are received and are normally completed in about 3 weeks after we receive <u>all</u> your information. However, the turnaround time will vary based on when all your information is received as there are other deadlines the office has during the tax season. If we have questions or contact you for additional documents, please try to respond promptly to prevent delays.

Electronic Documents:

- Send electronic documents in PDF file format and be sure they are clear and easy to read. If documents are too dark or small to clearly read, we will ask you to re-send them.
- Do not send duplicates (if you send an electronic copy of a form, we do not need you to also send the paper copy)
- Send all pages of your brokerage/investment tax forms
- Fewer files are better! It takes a lot of time to organize documents if each page is sent as a separate document.

Review Returns: We will not electronically file your tax return without your signature(s). It is your responsibility to carefully review your completed tax return before signing it. If you have questions about your tax return, please ask before you sign. Be sure to read the information we send you. We always provide you with filing instructions, payment instructions, refund, or tax due information, a copy of your return and an invoice. If you have any questions about your completed tax return that are not answered in the information we send you, please do not hesitate to contact us.

Fees: Tax preparation fees do not cover additional services requested by you, such as tax planning, projections, responding to notices* and research. We base our fees off 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.

*We will review, free of charge, any tax notice that you receive, but we will charge for any correspondence or work that we may need to do because of a client or IRS error.

Phone Calls, Messages, Emails: During tax season, emails and messages will be reviewed within 2-3 business days so we can assess the urgency of the message. Please keep in mind that we may not respond to your message until we are working on your tax return or when time is available. If your email/message contains information we requested or are waiting for, we may not always be able to take the time to respond if we do not have further questions.

A friendly reminder…please try to avoid calling or emailing to check on the status of your tax return or to see if we need additional information. We will always contact you by email or phone when your returns are complete or if we have questions. Responding to these questions takes valuable time away from our tax preparation process. Please be patient and trust our process during this extremely busy time.