TAX & ACCOUNTING SOLUTIONS
1979 Hubbard Road | Madison, Ohio 44057
Office: (440) 983-4001 | Fax: (440) 607-4211 | Text: (440) 381-1428
info@kmstax.com | kmstax.com

Thank you for considering us for your tax preparation needs. We know you have many options when it comes to the preparation of your income tax returns and we are honored you are considering us! Please know we will always strive to exceed all your expectations.

We offer several convenient ways to get your returns prepared. As always, we accept drop-offs, where no appointment is necessary. Just stop anytime and we will gather some information and you'll be on your way. If you don't want to come inside, just call when you arrive, and we will come out to get your tax documents. We also offer virtual tax preparation, so there's no need to come to the office at all. We have a secure client portal for you to upload your tax documents and we offer an electronic signature option. If you are interested in virtual tax preparation, please contact us to get started! Of course, we always love to see our clients, so if you'd like to schedule an appointment to come in, you may contact us via phone or email to schedule an appointment, or you can conveniently schedule an appointment from our website.

Our normal business hours are Monday through Friday, from 9:00 a.m. to 5:00 p.m., with evenings and weekends by appointment only. We will add extended hours beginning February 1, 2024, to include Monday evenings until 7:00 p.m. and Saturday mornings from 9:00 a.m. to 12:00 p.m. If you require an appointment outside our normal business hours, please don't hesitate to let us know and we will accommodate the best we can.

We have enclosed a new client checklist to assist with gathering your tax documents. We will prepare your returns from the information you provide and will contact you for clarification when needed and we will complete a prior year comparison to help identify any missing information.

Don't hesitate to contact our office at (440) 983-4001, or text us at (440)-381-1428 if you have any questions or need additional information. We look forward to working with you!

Sincerely,

Kathleen Smychynsky, EA

Kathleen Smychynsky, EA
KMS Tax & Accounting Solutions

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About Us

KMS Tax & Accounting Solutions is a full-service tax and accounting firm providing professional and personalized services that are customized to each client's specific needs. Whether you are an individual in need of tax preparation and tax planning or a small business in need of bookkeeping, accounting, or payroll help, we offer the personalized, professional service you are looking for! Our mission is to provide exceptional financial, tax, and consulting services to our clients.

Kathleen M. Smychynsky, EA has over 30 years of experience in corporate and personal tax preparation, tax planning & advisory services, accounting, payroll & payroll taxes, small business start-up, and financial and business consulting. As an Enrolled Agent and member of the National Association of Enrolled Agents, she completes over 30 hours of continuing education in the tax field each year. Kathleen is an **Elite Level QuickBooks ProAdvisor** with extensive experience in QuickBooks, Sage Accounting, and various other accounting software packages.

Our team of skilled professionals at **KMS Tax & Accounting Solutions** is committed to excellence. Our continual investment of time and resources in professional continuing education and state-of-the-art technology is essential in ensuring we deliver only the highest quality work. We believe in the value of relationships, and we view every client relationship like a partnership. Our goal is to provide the guidance necessary to enable our clients to make informed financial decisions. We believe our success is dependent on our clients' success.

Enrolled Agent

Enrolled Agents (EA) are America’s Tax Experts. An Enrolled Agent (EA) is a Federally Authorized Tax Practitioner who has technical expertise in the field of taxation and who is empowered by the United States Department of the Treasury to represent taxpayers before all administrative levels of the Internal Revenue Service for audits, collections, and appeals. Enrolled Agent status is the highest credential the IRS awards. Individuals who obtain this elite status must adhere to ethical standards and complete 72 hours of continuing education courses every three years.

Enrolled Agents, like attorneys and certified public accountants, have unlimited practice rights. This means we are unrestricted as to which taxpayers we can represent, what types of tax matters we can handle, and which IRS offices we can represent clients before.

Tax Preparation • Accounting • Payroll • Audit Representation

Providing professional and personalized services you can count on!

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Privacy & Data Security Policy

To keep your data secure, we maintain physical, electronic, and procedural safeguards that comply with our professional standards and the requirements imposed on us by the Internal Revenue Service.

Safeguarding confidential information is crucial to protect sensitive data from unauthorized access, disclosure, or misuse. We have implemented strong access controls to limit access to our client's confidential information to only authorized individuals on our staff.

Our use of passwords, multi-factor authentication, and encryption to secure access points ensures your information is always safe and secure. We conduct regular security audits to identify any vulnerabilities and weaknesses in our systems and implement updates and improvements to continually maintain a safe and secure environment.

The protection of our clients' personal information is our priority, so we will never disclose any personal information about our clients or former clients to anyone, except as requested by our clients or as required by law. All documents containing any personal information are disposed of securely by an authorized shredding service provider.

All employees are trained on the importance of confidentiality and the proper handling of sensitive information. We conduct regular security awareness training to keep employees informed about the latest threats and best practices.

If you have any questions about our privacy policy, please do not hesitate to contact us at (440) 983-4001.

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Personal Tax Preparation Checklist

Please include the following information with your tax documents:

☐ Driver's license or State issued ID Card information for taxpayer and spouse (if applicable)
☐ Copy of prior year income tax returns
☐ Bank information for direct deposit of refunds
☐ Social security numbers for all dependents
☐ Dates of birth for all family members/dependents

Please also include any of the following documents that pertain to you:

☐ W2 forms
☐ K1 forms
☐ Self-Employed taxpayers – record of all income & expenses
☐ 1099 forms reporting unemployment compensation
☐ 1099 forms reporting state and local refunds
☐ SSA-1099 forms reporting social security benefits
☐ 1099-R forms reporting IRA or pension distributions
☐ 1099-INT forms for interest income
☐ 1099-DIV forms for dividend income
☐ 1099-B forms & consolidated statements (broker's statements) reporting dividends capital gains, and stock sales for the current tax year as well as the original purchase date and cost information
☐ 1099 forms for all other income, i.e., 1099-MISC, 1099-NEC, etc. (bring all 1099's received)
☐ 5498 forms reporting IRA balances and accounts
☐ Health Savings Account Forms (5498-SA, 1099-SA) for contributions and distributions
☐ 1095-A form – Health Insurance Marketplace Statement
☐ 1098-E forms for student loan interest
☐ 1098-T tuition statements
☐ 1098 Mortgage Interest Statements
☐ Property tax statements for real estate taxes paid during the tax year
☐ Settlement statements for the purchase or sale of real estate
☐ Name, address, and Federal I.D. of childcare providers and amounts
☐ Health insurance premiums, long-term health care premiums, and out-of-pocket medical expenses
☐ Electric Vehicle information for EV Tax Credit, if applicable
☐ Record of estimated tax payments