

The Latest Updates and Announcements

INSIDE

Information to Prepare Your Tax Return 2023.

Information

This section contains info on what needs to be completed before your return can be e-filed.

Important Dates

Here you will find Dates to remember for filing your 2024 tax returns.

Appointments

This will explain how appointments will be handled for 2024.



As we go into the Holiday season, we hope you had a great year. We have included important information below to help everything run smoothly for the upcoming tax season! Please feel free to contact our office should you have any questions or concerns! (847) 469-1104

Information

With the ever-rising costs, we are highly recommending all our clients obtain a secure client portal. By having your own portal, you can send documents to us as well as the ability to access all tax years and original documents. The Portal is also important as we cannot receive any communication via email with sensitive tax information, if anything is received via email it will not be accepted.

Client Information Sheet & Engagement Letter Needs To Be Completed & Signed This Year! These forms can be found on the website, on our door, or you can contact the office to have one put into your portal.

No Returns Will Be Electronically Filed Until All Forms Are Signed And Fees Are Paid! We have completed the preparation, so it is important that info is approved and paid for. For signatures we can have you sign electronically, and you will be able to review your tax return and then sign where indicated or you can visit the office as well. We can also upload your forms to the client portal, where you can then print out, sign, and scan back into the portal.



2024 Fees Start At:

INDIVIDUAL RETURNS (includes Digital Copy Only)

Form 1040 - \$250

Retired Senior Return - \$40 - \$65

Dependent Student Return - \$50

Paper Copy of Return is an additional \$7.

ADDITIONAL FORMS

Schedule C - \$35 each (Must include Income & Expenses)

Schedule K1 - \$10 each

Rental Income - \$35

2441 Childcare - \$5

Earned Income Credit - \$25

Educational Credits - \$25 each

Form 8949 Bit Coin/Crypto - \$75 (Information on how to complete the 8949 is on the Website)

CORPORATE RETURNS

Start at \$300

OTHER CHARGES & Discounts

Additional Paper Copies of any Tax year are \$15 each

Priority Mailing Fee \$15

Consultation Appointments \$75/Hour

Expedited Fee for tax prep \$50

First Time Client Discount \$10

Extensions \$10

Important Dates

Filing Season usually begins the last week of January 2024. Please mark your calendars! **PLEASE MAKE NOTE IF YOU REQUIRE AN EXTENSION, YOU MUST CONTACT THE OFFICE AND REQUEST ONE.** Extensions are \$10. If you think you will owe, payment is recommended to be sent in with this form.

Corporate Returns are due **March 15th**. Info must be in the office by **March 1st**. If an extension is requested, that will only extend the date to file a return by **September 15th**, does not extend time to pay and all information must be in office by **September 1st**.

Individual Returns are due **April 15th**, and all info must be in the office by **April 1st**. If an extension is requested you will have until **October 15th**, and all info must be in the office by **October 1st**.



Appointments

Corporate Appointments can be scheduled as of January 3rd, 2024. Individual Appointments can be scheduled starting February 1st, 2024. You are welcome to drop off or schedule a Zoom meeting at any time. If doing a Zoom all your tax info must be dropped off or uploaded to the portal **a minimum** of 48 hours prior to Zoom meeting. Appointment times will be made available in January. Scheduling can be done through Google or by calling the office. **Drop Off** turnaround time is 7 to 21 business days. Time frame may increase due to office volume.

