

## The Latest Updates and Announcements

### INSIDE

Information to Prepare Your  
Tax Return 2024

#### 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 2025



*As we go into the Holiday season, we hope your 2024 ended on a high note. We have included information below to help everything run smoothly! Please feel free to contact our office should you have any questions or concerns!*  
*(847) 469-1104*

*As many of you are aware, Whitney Robbins left our office. Due to this occurrence and the struggle to find a replacement has been difficult. So this year there will be just 2 of us working on completing returns! With that being said we are requesting patience from all of our existing clients. In person appointments will be very limited, and we are encouraging drop offs, also we will not be able to provide a time line on completion date. We also will not be taking on new clients right now.*

## Information

Again, this year we are highly recommending all of our clients obtain a secure client portal if you have not already done so. Having your own portal allows the opportunity to communicate securely by sending sensitive information 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 it will be deleted immediately.

**Client Information Sheet** for this year will just need to be reviewed and initialed to ensure information is correct PRIOR to preparing your return. If you are uploading your tax info to the portal, let us know and we will put the current **Client Info Sheet** up there to review and initial. If dropping off, we will have you review and initial at that time.

**Our Engagement Letter Needs To Be Signed PRIOR to preparing your return.** This form can be found on the website, on our door, or you can contact the office to have one put into your portal.

**CRYPTO CURRENCY-** If you sold any of this type of currency an 8949 Form must be completed by you. Detailed information is located on our website or requested from the office.

**No Returns Will Be Electronically Filed Until All Forms Are Either Reviewed or 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 with **DocuSign**, Client Portal or in person, where you will be able to review your tax return and then sign where indicated, **Email Addresses Are Required.**



## 2025 Fees Start At:

### PERSONAL RETURNS (includes Digital Copy Only)

Form 1040 - \$250

Senior Return - \$40 - \$65

Dependent Student Return - \$50

**Paper Copy of Return is an additional \$10**

### ADDITIONAL FORMS

Schedule C - \$30 each (Must include Income & Expenses)

Schedule K1 - \$25 each

Rental Income - \$35

2441 Childcare - \$10

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 \$20 each

Priority Mailing Fee \$18

Consultation Appointments \$80/Hour

First Time Client Discount \$10



## Important Dates

Filing Season usually begins the last week of January 2025. **PLEASE MAKE NOTE: IF YOU REQUIRE AN EXTENSION, YOU MUST CONTACT THE OFFICE AND REQUEST ONE BE COMPLETED! Extensions only provide extra time to file, but not PAY, so if you think you will OWE taxes YOU MUST send a payment in with extension or you will incur penalties and interest. The cost will be \$15.**

**CORPORATE RETURNS (S-Corp, LLC, Etc.):** Due **March 15<sup>th</sup>**. Info in the office NO LATER THAN **February 10<sup>th</sup>**.

If an extension is requested, that will only extend the date to file a return by **September 15<sup>th</sup>**, it does not extend time to pay and all information in office NO LATER THAN **August 8<sup>th</sup>!**

**PERSONAL RETURNS** due **April 15<sup>th</sup>**, and all info in the office NO LATER THAN **March 10<sup>th</sup>**. If an extension is requested you will have until **October 15<sup>th</sup>**, and all info in the office NO LATER THAN **September 10<sup>th</sup>**.



## Appointments

As in past years we highly recommend **DROPPING OFF OR UPLOADING** your information to the portal for completion. In Person appointments will only be scheduled on **Tuesdays, Thursdays and Saturdays**. Zoom appointments can also be scheduled at any time, but please note that your tax info must be dropped off or uploaded to the portal **a minimum of 48 hours prior** to Zoom meeting.