

Welcome back to Waddleton Tax, Inc.

We are happy to see you again!

Please read carefully as these changes
WILL impact your filing season!

Our Office Hours

M-F 9AM to 5PM

Tax Return Retainer:

- \$100 - Student / Military
- \$300 - Individual / Family
- \$500 - Corporate

Additional Rates:

- Tax Resolution: \$350/hr. w/ 1/2 of total estimated returns as retainer, with monthly billing before returns are filed.
 - Offer-in-Compromise. (Minimum: \$5,000)
 - Innocent Spouse / Installment Agreements (Minimum: \$2,500)
 - IRS and State Entity Letter / Form Responses (Minimum: \$700 – per response)

Important Changes for 2026 Tax Season

Tax Season is here, and we would like to share with you some information that will be very useful for you to keep handy.

Services not provided:

- We do not offer bookkeeping or bookkeeping clean-up services. If needed, we are happy to refer you to trusted providers.
- We do not categorize income or expenses from bank statements or raw financial documents. We accept completed financial statements or self-categorized summaries with totals.
- We do not offer converting Apple documents and iPhone images. All documents must be submitted in a standard, accessible format.

Service Changes:

- Communications via text

- No documents or tax related conversations will be sent through text
 - Communications need to be through the Verifyle App, which is secure and allows for better tracking
 - We will ask you to respond with your question or upload documents to the portal as appropriate.
- We are moving to subscription pricing and billing, which will allow you to pay monthly or annual fee for the year. New clients will default to this option; existing clients can choose this option, but the rate is a little higher for non-subscription clients.

Websites:

1. **Client Portal** – <https://verifyle.com> Secure Communications and Document Delivery.
Verifyle also has a mobile app which is very handy.
2. **Client Agreements and Billing:** <https://anchor.sh>
Emails get sent from portal.
(directly)
3. **Cognito Forms** – Client / Business Organizers
Please make sure to save progress and use the resume email link for updating your organizer.
4. **Reminders and Other important information** – Mailchimp service.

Security Note:

Email is not secure, but the portal is secure for communication and uploading documents. Please utilize the uploading and messaging features provided through those methods.

Deadline & Billing Policy Changes:

- Waddleton Tax, Inc. enforces a one-month deadline policy. All required tax documents, organizer, and retainer must be received at least 30 days before your filing deadline; otherwise, your return will be automatically extended. Depending on your tax situation, additional penalties may apply if taxes are owed or informational returns are required.
- If you are unable to provide me with all necessary information and documentation required to properly file your return by March 16, 2026, you will be required to fill out an extension form no later than March 31, 2026.
- If your return is incomplete by **March 31, 2026** and we have a completed extension form on file, we will file an extension on your behalf. If we have not heard from you and no extension form has been provided, we will assume another professional is handling your return and no filing will be made.
- **An extension delays filing only—not payment. Taxes owed are still due, and interest and penalties may apply.**

- Billing is final once your return is approved. After approval and prior to filing, Waddleton tax, Inc. will have Anchor issue a final invoice. If there is a payment issue, your return will be held until the matter is resolved.
- If any invoices are outstanding at the start of tax season, all balances must be paid in full before we begin work on your 2025 tax return.

Please Note (Deadline Notices):

8821 Requirement:

An existing requirement is that we require a current (individuals and businesses) **8821 (IRS Tax Information Authorization) form**. This allows access to current and previous tax records as needed. This authorization allows Waddleton Tax to provide quality and preemptive services in a timely manner. Please inform us if you receive any notices from the IRS. We do not receive them unless we are an authorized representative for your account.

Federal Filing Deadline Summary:

3/16/2026 - (Tax return ready for preparation by 2/16/2026)

S Corporations & Partnership Returns due to the IRS

Last Day to file 2553 election for S Corporation in a timely manner

4/15/2026- (Tax return ready for preparation by 3/15/2026)

Individual and Self-Employment tax returns due to the IRS

5/15/2026- (Tax return ready for preparation by 4/15/2026)

Tax Exempt Organizations returns due to the IRS

6/17/2026- (Tax return ready for preparation by 5/17/2026)

Last day for U.S. citizens and resident aliens living and working (or on military duty) outside of the U.S. and Puerto Rico to file

Additional Important Dates:

- 1/15/2026
 - Estimated Taxes - Final installment of 2023 estimated taxes for individuals.
- 1/31/2026
 - W2 and 1099R amount to be filed with Social Security Administration
 - Employers to file 1099's and received to individuals.

Rate Information:

We are moving to subscription pricing. We will bill clients either once a year or monthly. The link below shows our current pricing by return type. We offer different subscriptions based on the types of services that you would like to subscribe to.

<https://waddletontax.com/tax-subscription-plans>

Note: Non-Subscribers, do not receive any additional services.

A small number of returns will fall in the following situations:

- **High income households** (\$250K and above), a tax preparation fee “floor” at **0.15% of the total income shown on the tax return**. The higher risk associated with higher income return necessitates a high fee that a return of the same complexity at a lower income level.
- **Married-filing-separate** tax returns (one filing for each spouse), minimum of \$600. Generally, a set of two married filing separate returns are more complicated than two single returns, and more complicated than one joint return.
- **Amended tax returns** vary widely in price, depending on the amount of work needing to be done; the fee is based on the amount of work needed.

Action Items:

Create your Account on the IRS website.

Use [online account](#) to securely access the latest information available about your federal tax account and see information from your most recently filed tax return on IRS.gov. You can:

- E-Sign some authorization document like 8821
- View key data from your most recent tax return and access additional records and transcripts.
- View details of your payment plan if you have one.
- View 5 years of payment history and any pending or scheduled payments.

Please start setting up your IRS online account located at:

<https://www.irs.gov/payments/your-online-account>.

Please plan accordingly, remember it doesn't have to be done all at the same time. Thanks!