

PATRICIA'S TAX SERVICE

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Year 2025 was full of changes that are impacting tax returns & there's a lot of information swirling about the internet, not all correct or helpful. If you hear something but aren't sure, please contact us first! *We have included a new organizer and would ask everyone to include the completed document with their tax paperwork.*

Starting February 2nd, office hours will be Monday through Friday from 9:00 to 7:00, with Saturday hours of 9:00-2:00 beginning Feb. 7th. Not sure if you have everything? Review your previous years' documents as all the information you provided last year will be in the back of the blue folder.

When you have **ALL** your tax documents gathered, please call for an appointment with either Patricia or Mary. We have a new intake sheet that will require a few minutes of your time at the beginning of your appointment or when you drop off your documents. Please be patient as we try to streamline our process to make it easier for you to get your return completed quickly and accurately. Parking in our area is always at a premium but the various construction projects currently active can create greater challenges so please keep that in mind when heading to our office.

Drop-offs are available during normal business hours, or you can upload your documents to our secure web portal at www.patstaxs.com. We cannot accept attachments via email any longer due to security protocols.

The IRS has announced that they will start accepting tax returns on **Jan. 27, 2026**. Individuals tax returns are due by April 15, Partnerships and S-corporations are due March 16. Individual taxpayers who request an extension will have until October 15th, 2026.

A few highlighted changes are listed below and may require additional documents to file:

- ❖ **Tips** may be non-taxable, but proof of tip income received is required
- ❖ **Overtime** may be non-taxable. Please bring final paycheck or payroll report specifying amount paid for the "premium" hourly rate
- ❖ **New car loan interest** up to \$10,000 may be deductible, conditions apply
- ❖ **Charitable contributions** now have a threshold before impacting your Federal return
- ❖ Hawaii (& other states) may not align with Federal changes
- ❖ Seniors (65+) could receive an additional \$6000 deduction
- ❖ Social security cards (or copies) are required for all tax filers. We will be taking scans upon check in for appointments

For suggested documents list, please see the end of this letter as we've updated requirements for most filers.

Reminder: Please bring any federal or state notices to the office. It is much harder to solve problems if you wait until the case is closed.

PRIVACY NOTICE

We do not disclose any non-public personal information about our customers or former customers to anyone, except as instructed to do so by such customers or as required by law. We restrict access to non-public personal information to those professionals necessary to prepare tax returns and we maintain physical, electronic, and procedural safeguards to guard your non-public personal information.

DOCUMENT REQUIREMENTS:

Individuals:

- SS cards or copies
- All income, including W2, 1099 (all types), SSA-1099 Social Security
- 1098 Mortgage interest paid
- Property tax statement (if not on your 1098)
- Charitable contributions, cash/check and physical donations separated
- Medical out-of-pocket expenses, including copays, prescriptions, long term care premiums
- Work expenses not reimbursed by your employer, State purposes only
- New spouse or dependent: copy of SS card and birth certificate (dependents)

Businesses (Sole-Proprietor, Partnerships, S-Corp, C-Corp):

- Profit & Loss (aka Income Statement)
- Balance sheet
- Payroll reports if applicable
 - 941-all quarters
 - 940
 - W3
 - State SUTA statement of payment
- General Excise G45 and/or G49 filed
- Mileage driven for business AND personal
- If providing bank/credit card statements as proof of deductions, there will be an accounting charge to review, minimum charge \$40.00

➔ Documents may be provided physically or uploaded to our website, www.PatsTaxis.com. We take protecting your personal information very seriously and do not recommend sending sensitive information through email.

➔ If you upload a document to our website portal, please do this **BEFORE** your appointment and reference when your upcoming appointment is scheduled.

➔ We apologize for the inconvenience, but we will no longer accept screen shots, email images or links to download your documents. The *only* exception is if your financial institution sends a link to download the documents.