



December 12, 2024

With a heavy heart, I announce Zac's departure from the firm to pursue different interests. With this change, I have reorganized my practice to best serve my clients moving forward.

With appointments now very limited, I am requesting that clients drop off their tax documentation or upload it to your secure portal. If you do not yet have a secure portal set up, please contact Chris and she will set that up and send you a link. Chris can always set up an appointment upon the completion of the return. If there are changes to your financial status or questions, please make your appointment as soon as possible as the appointments get booked up early on. There is more availability near the end of March and into April. You may email, fax or send certified mail to the numbers listed at the bottom of this letter. Drop-off returns are normally completed within 5-10 business days. Returns are filed upon receipt of payment.

Important dates:

1040, 1041 and FBAR, individual/estate/trust and FBAR returns are due April 15, 2025. 1040 extensions are due October 15, 2025.

1065 and 1120S, Partnership and S-Corporation returns are due March 15, 2025. 1065 and 1120S extensions are due September 15, 2025.

1120 Corporation returns are due April 15, 2025. 1120 extension are due October 15, 2025.

Partnerships and S-Corp tax working documentation are due in my office by March 1, 2025. I will file an extension if not received by that date.

Individual and Corporate tax working documentation is due in my office by April 2, 2025, for completion by April 15, 2025, or an extension must be filed.

Extensions are for filing only – not for payment.

A fee is charged for phone calls and emails throughout the year in 15-minute intervals. These take a considerable amount of time and research, depending on client needs, and my clients deserve to have the best information to allow them to make sound decisions in their financial lives.

I am looking forward to working with you and catching up on your 2024! Thank you for your continued support and loyalty. This means more than my words can express.

I am thankful for each of you, and I appreciate your help in making this transition as smooth as possible.

Sincerely,

A handwritten signature in black ink that reads 'Pama Beatty' in a cursive script.

Pama L Beatty, EA

CEO Beatty & Co Tax and Accounting

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