

Dear Client:

January 2025

**Our office location is the same as last year.** We are in the Farmers Insurance Agency, on the southeast corner of 144<sup>th</sup> Place and LaGrange Road, at 9567 144<sup>th</sup> Place, in Orland Park. The Agency was recently sold to Heinrich Alavarez. Effective January 1, 2025, Farmers Insurance Agents will also be offering both **personal** and **commercial insurance** from these insurance companies: ASI, National General, Progressive, Safeco, and Travelers. This will allow you to better compare the costs and coverage for your specific insurance needs.

There are two main options on how we could prepare your tax return this year:

**Option 1**, Schedule an appointment to come into our office. **Before** February 1, call 708-349-4023, (my home phone). **After** January 31, call 708-403-0966 (our office phone). **Or**, text my cell phone, 708-337-2099, **or**, e-mail me at dougkehrketaxprep@gmail.com to schedule an 'in office' appointment.

**Option 2**, if you prefer not to come into our office for your appointment, you could either:

- 1) Mail your tax documents to Gehrke Tax Prep, 9567 144<sup>th</sup> Place, Orland Park, IL 60462
- 2) Drop off your tax documents at our office
- 3) Scan your tax documents to dougkehrketaxprep@gmail.com**
- 4) FAX your tax documents to our office @ 708-349-5070

Contact us, so we can expect, and look for, your tax documents

There are **four situations** where you will need to bring in, or send us additional information

- 1) If you sold stocks, or any other financial instruments in 2024. We will need your entire **Final** Brokerage Statement (**1099-B**). **Final** Statements often do not arrive until late February to mid-March
- 2) If you, your spouse, or any of your dependents, took any college classes in 2024. We will need Form **1098-T**, from the College. Your student may need to access that form online.
- 3) We need Form **1095-A** if any of your health insurance was purchased through the Marketplace
- 4) Bring in records of any Energy Improvements you made to your personal residence. You may qualify for a tax credit. Examples include; Insulation, windows, doors, solar panels, furnace, and air conditioning.

Our website, **gehrketaxprep.com** offers you the ability to pay your tax prep fee online, by E\*Check, or by credit card. There is also a link to pay your Fed and State government liabilities, if any, online. Our website also has many tips, suggestions, and links to helpful sites which can aid you in your tax preparation.

The increased complexity of the tax laws may result in an increase in your tax prep fee this year.

**\*\*Our Office Hours remain from 9am-8pm, on Monday-Saturday, and Sunday mornings\*\***

My son, Rob, is an Optometrist. Many of you have used him for eye care and have become his patients. His office contact number (Lockport) is 815-836-3564. He also has a Bedford Park Office. Thanks for your consideration.

Douglas C. Gehrke AFSP, RTRP, MBA

Registered Tax Return Preparer

Jean C. Gehrke AFSP

Annual Filing Season Participant