



LEV AND BUNZEY, LLC
ACCOUNTING AND TAX SERVICES

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PRINCIPAL

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Dear Clients:

Happy New Year to you and yours. As we start 2025, we are gearing up for another tax season and we would like to remind you to start gathering all your tax information. Enclosed is a checklist to aid you in gathering your tax documents for 2024.

A few tax laws to note:

- Required Minimum Distributions (RMD) age at which individuals must begin taking distributions from traditional IRAs and retirement plans increased to 73.
- The business standard mileage rate was increased to 67 cents per mile for 2024.
- For those of you who have Clean energy and Efficiency tax credits for 2024, additional information will be needed to fill out the credit forms. Please send a copy of the purchase invoice for purchases of electric plug-in vehicles (new or previously owned vehicles purchased in 2024), fuel cell vehicles and note any residential energy improvements.

As in the past, all invoices are due and payable upon completion of the return. Returns are prepared in the order they are received. To ensure that your return is prepared on time, please have your completed information to us no later than March 20th. Otherwise, we may not be able to meet the April 15th deadline and extension requests may need to be filed.

We are able to work around your schedule and can provide services remotely or socially distanced in our office. For late drop-offs or quick stops, feel free to use our secure drop box located outside in the circle, in front of our building. You may email, mail or drop off your information anytime during our regular office hours, 8:30 am through 5:30 pm Monday through Thursday and 8:30 am to 5:00 pm on Friday. If you are emailing us tax documents, please make sure that it is in a secure manner using complex passwords or other security measures to ensure safety. Please call the office for a secure upload link.

The attached Consumer Bill of Rights is required to be sent to you. If you do not understand any part of this bill, please call us with questions.

Thank you for allowing Lev and Bunzey, LLC the opportunity to prepare your 2024 income tax returns. As always, we deeply appreciate our client relationships and will continue to strive to make them even better. If you need help with your accounting software or need assistance in gathering your information, please email or give us a call. We look forward to hearing from you.

Lev and Bunzey, LLC