

January 13, 2026

Dear Clients:

As the new year begins, so do the new tax laws put into effect from the **One Big Beautiful Bill Act (OBBBA)**. Most individuals will see some change in their tax return related to the additional tax credits or deductions made available in 2025.

As you start to gather your tax information, please review the checklist and questionnaire to aid us in accurately preparing your income tax return for 2025.

The IRS is **phasing out paper tax refund checks** beginning September 30, 2025. Direct deposit is recommended. For taxpayers without a bank account, there will be other options available, such as a prepaid debit card. More information is to be announced.

Please indicate if you would like a **paper copy** or **electronic copy** of your individual income tax return prepared. A secure folder will be created for you to be able to download your return.

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 or call the office for a secure upload link.

Thank you for allowing Lev and Bunzey, LLC the opportunity to prepare your 2025 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