

Hello and welcome to Mid-America Tax & Accounting. I have been serving the St. Louis Metro region since 1996.

The October 15 deadline is around the corner. I am taking on new clients, but I need you to work with me, as I am trying to meet everyone's needs and get everyone filed by the deadline.

I am working all weekend and will try to return your call as soon as I can, but it might take a day or so. If you don't already have my #, it is (314) 800-3251.

At this time of the season, I do not have time to give bids or an estimate of what my services would cost you but look at all my 5-Star Google Reviews and I believe you will be more than happy with my services!

As you can understand my time is limited right now, and I prefer to have you upload all documents to me, Gmail or Secure File Pro, (See below for details). If you want to drop off hardcopy documents, you can, but you will have to wait until Monday. I do not have time right now for face-to-face appointments, as I am working around the clock to meet everyone's needs.

I ask that you wait until you have everything together and then email (or secure upload) all at one time. If you need back-to-back emails that is fine, but I want you to submit all your documents together so I can keep track of them more efficiently.

Please carefully read to see what I need. I like to receive everything at one time, that makes preparing your returns more efficient and accurate.

- Your 2024 Fed and State returns (all pages)
- **Look at prior year tax returns or your current tax forms (W-2 etc.). Can I see FULL Social Security #'s or are the XXXX'd out.** Provide Full SSN if I can't see them
- Pic of FRONT of each of your driver's licenses (spouse too if you are married)
- Bank info for Direct Deposit. Bank Name, Routing #, Acct #.
- Any children, I need Birth dates, full name and middle initial, and SSN.
- Did you sell a home in 2025?
- IRA contributions?
- If you have an HSA, is it for YOU only or for FAMILY?
- If married, both spouses cell #'s, email addresses, and occupations
- Investment statements, I need to see the FULL statements.

After you submit everything, rest assured we received them.

Then be patient and wait for me to reach out with any questions.

When I finish the returns, I will email them to you (and spouse if married), for your Review and Authorization to eFile.

Then you pay for my services through 1 of 5 different methods (apps like Zelle, Venmo, CashApp, PayPal etc.).

After I am paid, then I eFile

Been doing this since 1996 and I make the process streamlined and easy.

If you want to proceed, feel free to upload to my Gmail email address or use my Secure Upload Service (Secure File Pro).

Go to my website, www.taxprosteve.com

Then to **Tax Organizers Tab**

Then to **(C) Ways To Get Us Your Documents & How To Use Secure Portal Service.**

Thank you, and I look forward to becoming your new tax professional.