

NEXT TAX SEASON easy to prepare your pdf Organizers

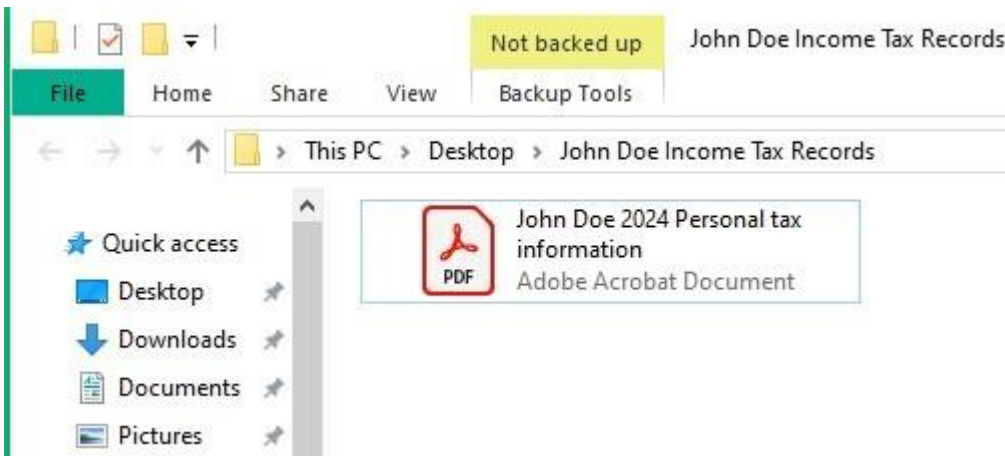
You create the New tax year Organizers by doing a Copy/Paste of each of your prior year Organizers. then Rename it for the current new tax year.

Example: Locate the prior tax year 2024 organizer. Right click, Copy or the copy icon (looks like a square with an A in it and a vertical line through it), then Paste or paste icon (looks like a clip board).

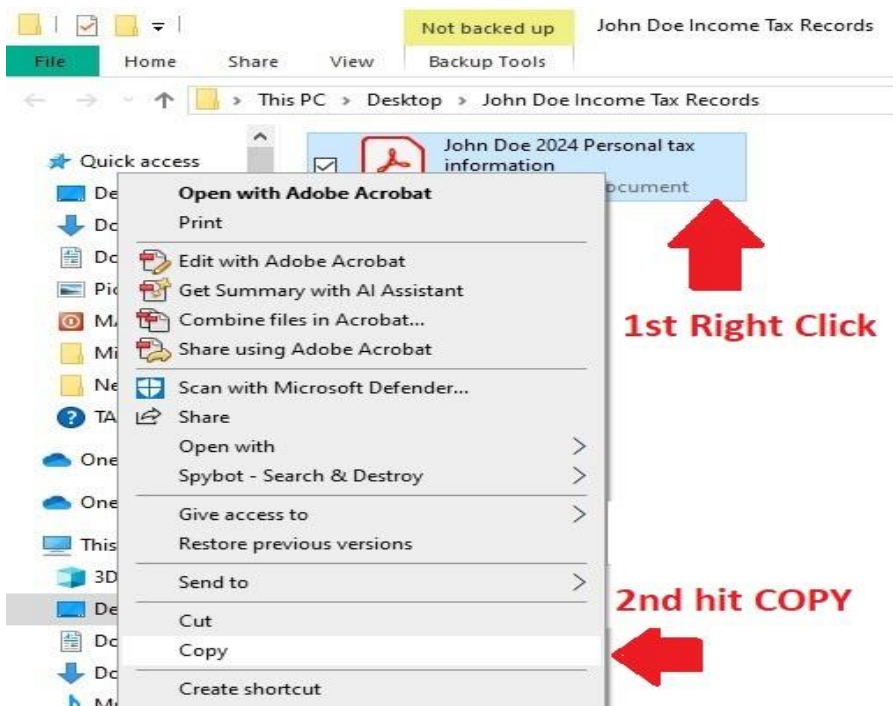
Right click the new (copy) you just made, and Rename it. Example: Tax Year 2025.

Open the Organizer and locate the RED RESET button. Click it, and the beauty is most of your data is already there. You only need to enter new current information.

Step 1 – Locate your prior year tax file



Step 2 – Create a COPY of prior year file



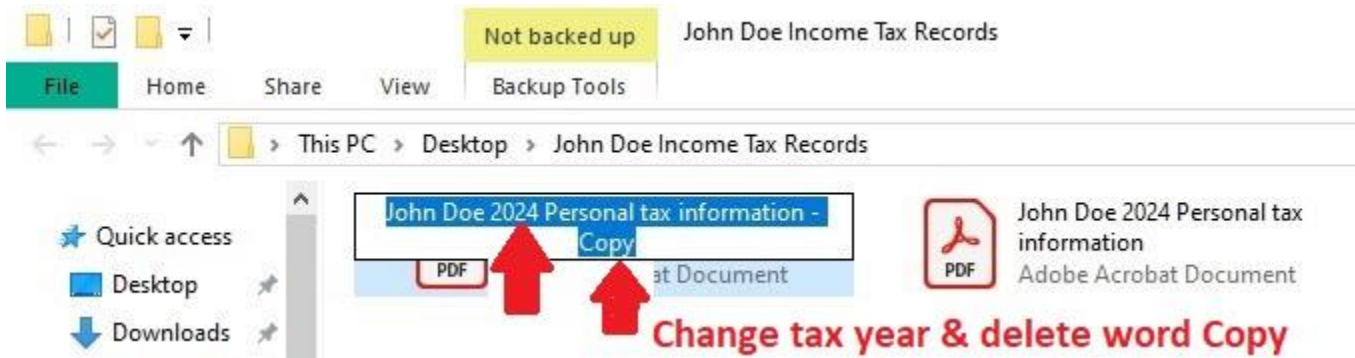
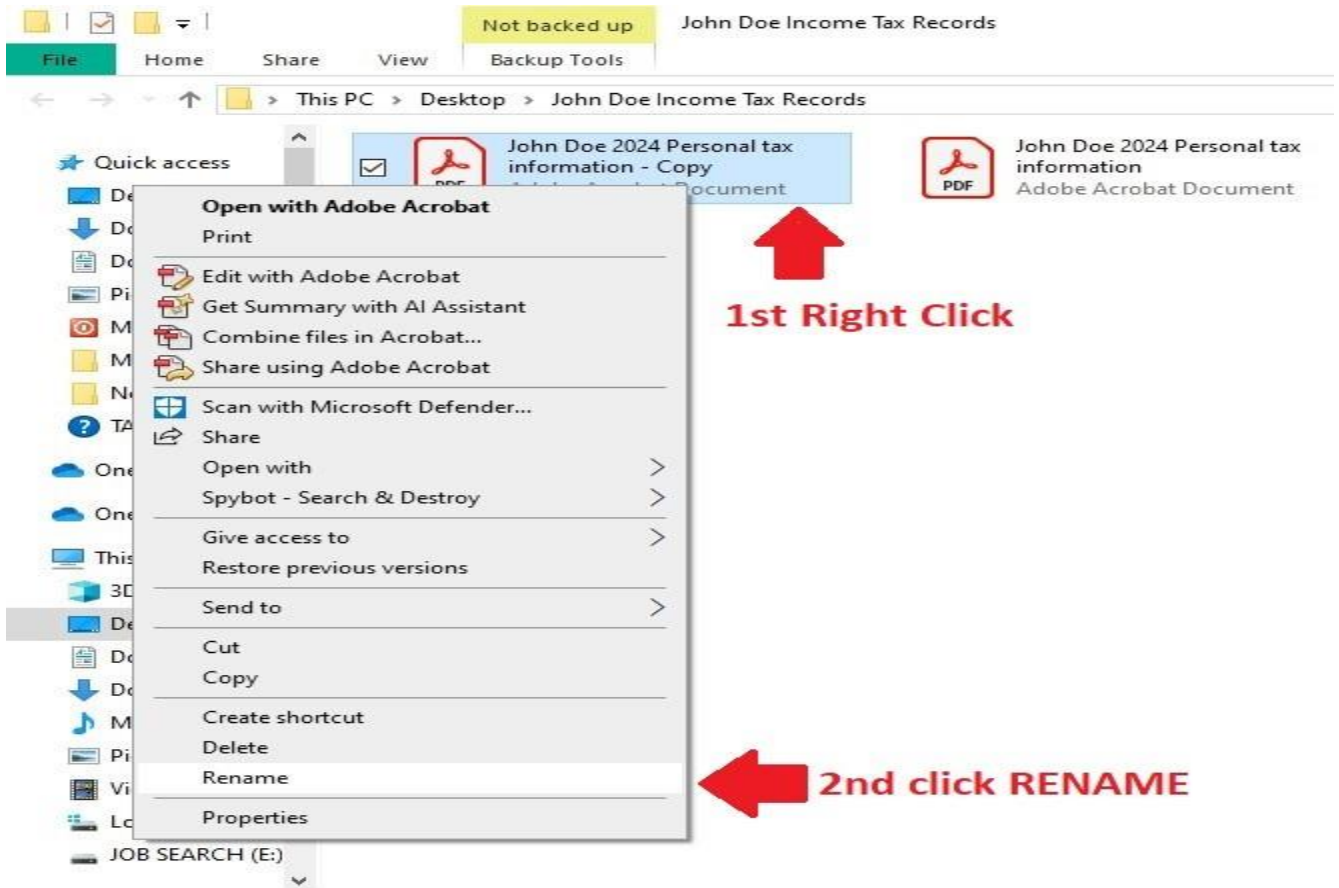
Step 3 – PASTE a Copy of prior year file



Step 4 – The COPY is created (note the word COPY on the right of the name)



Step 5 – You will RENAME it to the current tax year



Step 6 – Now open the New file, then scroll to bottom of Page 1 and Click the **RED RESET BUTTON**.

Mid-America Tax

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Engagement Letter Agreement

Page 4 is required to be signed by all clients, each year.
Joint returns require BOTH tax payers to sign.
You may type your name in place of a signature.

Personal Tax Organizer (PTO)

Required to be filled out by all clients, each year.

ALL CLIENTS - After you download this Engagement Letter and Organizer, "SAVE AS" to your computer with a unique file name like "John Doe 2024 Income Tax". Then completely fill it out the first time using it. You do not need to enter dollar amounts for income or expenses if those are shown on documents and forms that you submit. The following year, make a copy of the saved file, and RENAME it to something like "John Doe 2025 Tax Year". Then press the **RESET** button (below) and most of the basic information will be prefilled. **NOTE:** It is your responsibility to ensure all data is correct, new information is added, and irrelevant information is removed. **EXAMPLE:** Add or remove Dependents as needed.

ALL CLIENTS - When you have all your information entered on Organizers and other documents like W-2's Form 1099's, and K-1's, get them to your tax preparer as soon as possible please.

NEW CLIENTS - I need a copy of your prior year Federal and State Tax Returns.

DELIVER to your tax preparer: (1) Upload to our Gmail address or the Secure Portal upload service. (2) Deliver in person to the physical Secure Lock-box attached to the inside of garage door or in person if you have a Scheduled Appointment.

PRESS To RESET For New Tax Year You Are Submitting



Press this to RESET the form

Everything that pertains to the old tax year is reset of cleared out. The beauty is that all the things like Name, Address, Birthdates, Phone #, SSN, Kids names, SSN, etc are all retained and no need to enter those.

It'll be easy!