

Steven A. Phillips

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Dear friends and clients,

Happy New Year! With the 2025 year ending, it is time to start thinking about taxes again. I hope 2025 was a happy and prosperous year for you.

As you receive your 2025 tax documents, please collect and keep them together. Please open all envelopes and review your tax forms for accuracy. These documents include such items as your W-2's, 1099's, 1095's, K-1's, brokerage statements, etc. Photocopies of your tax documents are sufficient and recommended, but we will return any original documents received. Your check register may also include pertinent information. **If you would like a tax organizer to assist with assembling your tax information, please contact our office and we will be happy to email one to you. A fully completed organizer lessens the likelihood of omissions from your tax return.**

Please make your appointment early as my sit-down appointments are limited. If I have done your taxes before, you may drop them off instead of making a formal sit-down appointment. If needed, I will contact you to discuss any questions or issues I may have while preparing your tax return. If I do not receive your personal tax information by March 5th, 2026, or if there are unresolved tax issues or delays in processing, I cannot guarantee that your taxes will be finished by April 15th, 2026 and an extension may need to be filed. If you have a business entity with a due date of March 15th, 2026, we will need all necessary tax information no later than February 1st, 2026 to complete filing before the deadline without extension. **If it becomes necessary for you to file an extension, it is your responsibility to contact and notify us of your intention to file an extension as well as if you desire to send payment with your extension. If you file an extension, please note I will need your business tax information (if applicable) by July 15th, 2026 and your personal tax information by August 15th, 2026 to allow the necessary time to prepare your tax return.**

Please note I will not be able to electronically file your return until the E-file authorization forms are signed and payment is received for your tax return.

Please note that the fee for preparing your tax return is due at the time services are provided. If your bill remains unpaid after 30 days it will be assessed a 10% late fee for each portion of a month it remains unpaid. Additionally, my insurance company requires that I obtain a signed engagement letter in order to prepare your tax return. Please sign and return the enclosed engagement letter to my office along with your tax information, including all current contact information (address, phone number, and email address). This is necessary for me to prepare your tax return.

Throughout the year we realize that you may need additional copies of your return either in hard copy form or emailed to you in .pdf format. We are happy to provide additional copies upon request for a \$25.00 fee. Please note that unless we have a signed authorization form from you, we are not allowed by law to provide copies of your tax returns to any third party.

We now offer a Verifyle portal to allow secure uploading of your tax documentation on our website at www.stevephillipscpa.com!

I look forward to hearing from you soon. As always, please contact me if you have any questions.

Respectfully,



Steven A. Phillips, CPA