

Thank you for choosing Senior Tax Strategies, LLC. As we prepare for the upcoming tax season, I would like to share some important information and updates:

Contactless Tax Preparation Services

- We will continue to provide contactless customer service for tax preparation. This means no appointments or in-person visits to our office for tax services.
 - All completed tax returns will be sent to you by mail with tracking. Please do not request exceptions, as we must politely decline.
-

Prepayment is Not Necessary

- Please wait for us to send you an invoice before making any payments.
-

Organizer for Tax Documents

- A simplified tax organizer is provided for your convenience. You must include supporting documents for all income/expenses boxes checked on the client intake form. Feel free to add additional information on separate sheets.
-

First-Year Tax Clients

- If this is your first year with us, please include a copy of your last year's tax return, the birthdates and complete Social Security numbers for everyone on the return, and a contact phone number.
 - If you have rental property or other fixed assets, obtain the depreciation schedule from your previous tax preparer.
-

Dropping Off Your Tax Return

- When dropping off your tax information, use the envelope provided and place your documents in the black drop-box located to the left of the door facing the parking lot. The drop-box is locked, and the area is monitored by cameras.
 - Please do not ring the doorbell to drop off your tax returns, and do not use the mailbox at the front of the building facing the street.
-

Mailing in Your Tax Return

- When mailing your tax returns, use the pre-addressed envelope provided in this packet and ensure that you add the necessary postage.
 - If you want confirmation of delivery, please use that service through the post office. We cannot confirm receipt of your tax returns by phone. **Please don't call to ask if we received your packet.**
-

Emailing or Faxing Your Documents

- **We are unable** to accept documents via email, fax, or thumb drives. All documents must be submitted in paper format at one time.
- Please be patient if you have brokerage accounts, as they may not always arrive on time.

Taxes Received in Mid-March and Beyond

- It is unlikely that tax returns received after mid-March will be completed before the filing deadline. All taxes received from mid-March onward will automatically be extended. While this allows you to file after the deadline, you are still required to pay any taxes owed by the filing deadline.
-
- **If you moved**
 - Please provide your old address _____
 - Please Provide your new address _____
 - When did you move: _____
 -
-

Preparing Your Documents

- **Include copies of your year-end investment account statements with your tax documents—mutual funds, annuities, brokerage accounts, IRAs, 401ks, etc. Including these helps us catch missing 1099s and QCD amounts. If you would like a separate review of your accounts, let us know.**
 - **Please note:** If your child is in college and you are claiming them on your tax return, the 1098-T form must be included in your packet.
 - **Use a separate envelope** for your parents' or child's tax information if we are preparing their returns. **Do not mix their tax documents with your own.**
 - Ensure your dependent information is updated on the organizer—graduated college students are not likely to be your dependent.
 - If you sold your main residence, clearly mark that on the settlement sheet as your residence.
 - If you sent RMD money to charity by QCD, write the amount and the letters "QCD" on the associated 1099-R form.
 - **We do not prepare Philadelphia local taxes.**
-

Please Follow These Guidelines

- Complete the enclosed organizer and answer all questions.
 - Open all your envelopes and lay your documents flat.
 - Summarize your Schedule A expenses (**no receipts required, just a summary please**).
 - Include your local tax envelope or mailing address.
 - Include your Identity PIN if you have one from the IRS.
 - Make sure to include all tax payments to Federal, State, and Local.
-

Important Reminders

- **Direct deposit information is required.**