

January 2026

Another tax season begins! Included in your packet is your paper tax organizer.

When you have a majority of your 2025 information together; scan/upload, email, mail or drop it off. We have a mail slot, so you can drop off information 24 hours a day. Although we will try our best, extensions may be prepared for people who do not have their information in before March 15th.

- Fill out and return your organizer electronically or deliver by paper. At a minimum:
 - Review your personal information.
 - Fill out the questionnaire.
 - Sign and date the last page of the organizer questionnaire as acceptance of our engagement terms
- Upload or bring in the following documents:
 - All W-2's, 1099-R's reporting pension/IRA income, SSA-1099's reporting social security income
 - All 1099's reporting dividends, interest, miscellaneous income, stock, and real estate sales
 - All 1098's for mortgage interest and real estate taxes you paid.
 - Any K-1's for income from partnerships, S corporations, estates, or trusts
 - Any real estate HUD closing statement for sales, purchases or refinancing.

In addition, we have a couple of ways for you to get us your tax information *electronically!*

Safe Send Organizers – Even though you requested a paper organizer, we also send every client an organizer through Safe Send. You will receive an email with a link. If you upload documents to us, you do not need to fill out that specific portion of the organizer, we will grab the information from the documents (for example, if you give us a W-2 then you do not need to fill out the W-2 section of the Organizer. *The program will alert us that documents have been uploaded so you do not need to email us when you have uploaded tax documents.*

Safe Send Portal – You can set up your personal secure portal through the email link received with your tax organizer.

Safe Send Exchange - Each CPA has a secure link within their email signature that you can use to securely send us stray documents that come in after you have completed the organizer and uploaded documents.

Thank you for partnering with us for your financial and tax needs. For those of you that are new to our firm, welcome. Here's to another year of hard work and some fun along the way.

Best Regards,
Nancy, Kathy, Becky, Chris & Charity