

Guess what time of the year it is...TAX SEASON!

I know this can be a stressful process, we are here to provide you with the expertise and service you need and deserve.

Please begin to gather all your tax forms and required documents for us to properly file your taxes. You can upload your documents as you receive them, no need to wait. (If you're unsure what you need, we have put together this handy 1040 checklist for you here: [Tax Documents Checklist](#)).

To complete the organizer

- In the Organizer Section select "Client organizer required for ALL 1040 individual tax returns".
- Every client must complete an organizer each year.

To sign the engagement letter

- In the Contracts Section select the Engagement letter and electronically sign.
- Every client must sign an engagement letter each year.

Notify us when you are done.

When you have uploaded all documents, completed the organizer, and signed the engagement letter notify us so **we know you are done and can start reviewing your documents**. If you are waiting for a few documents let us know what you are waiting for; generally, we can still get the preparation started.

NOTE: This year's hurricanes extended all 2024 federal income tax filing deadline and payment due dates for all Florida Residents to May 1, 2025 (1040, 1065, 1120S, 1120 & 990 series).

NOTE: If you were impacted by a hurricane in 2024, please review this notice [Casualty & Loss Considerations](#)

Document submission deadlines:

- To complete your personal return by the due date we must have all (most) documents by **March 8th**. To complete the return by the **extended due date of October 15th** we must have everything by **August 15th**.
- To complete your business return (1065, 1120 or 1120S) by the due date we must have ALL information and documents by **February 2nd**. To ensure completion by the **extended due date of September 15th** we must have everything by **July 31st**.
- Extensions are due March 15th (business returns) and April 15th (personal returns). **An extension gives you additional time to file your return it DOES NOT extended the time to pay a balance owed to the IRS.**

Office processes and procedures:

I want to share a couple of important reminders regarding our office processes and procedures.

Keeping your information secure is my top priority. To maintain the highest level of security and efficiency, we will utilize my secure project management system Tax Dome to serve as your client portal and keep all our communication in one place. Please submit all documents via Tax Dome or drop off at the office. We CAN NOT accept documents via email.

- Appointments ARE NOT required or necessary. Documents can be uploaded or dropped off at the office anytime using the mail slot in the door. If you need to come into the office, message or call to confirm someone will be in the office when you plan to come by.
- If at any time you feel you need to speak with me or my assistant, you'll always have the option to request or schedule an appointment or call. Messaging via Tax Dome is the preferred and most efficient communication. You can also send an email to admin@taxhappens.com indicating your concerns and availability for a call and we will respond the current or next business day (remember the office is closed on Mondays).
- Fees are determined once we have all material documents and information needed to prepare the tax return. We require a non-refundable 50% deposit prior to the start of any work on your income tax return. The remaining amount is due when a draft of your return is provided and prior to the e-filing of your income tax return.
- Are you ready to get started?