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## IMPORTANT REMINDERS

### DEADLINES

- You must have your tax information to us by **April 1st to GUARANTEE that your taxes will be done by April 15<sup>th</sup>**
- If you think you may owe and know or think you may need an extension, **YOU** must tell us you want to make a **PAYMENT WITH THE EXTENSION**

### Take Home Return Type

- Please indicate this preference on the taxpayer worksheet! If a preference is not chosen, we will prepare the return as a paper copy.
- If you chose the flash drive option last year, make sure to bring it back, as we can re-use it for this year's return and you will receive a discount!

### Identity Protection Pin (IP Pin)

- If you had an "IP Pin" last year, you **WILL** have one this year and we will need this 6-digit number to complete your return. You should receive a letter in the mail regarding this pin; however, if you do not, you can access the pin at [www.irs.gov/get-an-ippin](http://www.irs.gov/get-an-ippin) or by calling 1-800-908-4490

### Additional Information

- Please include your Driver's License or state issued ID information on the worksheet. This is a requirement for electronic filing and we are **NOT** able to do so without this information.
- If you wish to have your return mailed to you upon completion, there will be a \$10 postal charge added to your invoice.
- **If you are sick by any means, please do not come into the office!** Other arrangements can always be made.

January 2025

### Dear Valued Client,

Happy New Year! We hope that you and your family have remained safe and healthy through the holiday season. We would like to thank you all again for continuing on with us and being a part of our success as we prepare for another tax season! As always, please feel free to drop off your tax information at your convenience and we will prepare them as they come in. We will call if we have any questions, and will call once finished so you can stop back to pick up the completed return. We will begin accepting information on Monday, January 27, 2025. *Please read the side bar for additional information before stopping by!*

#### Mount Pleasant Office Hours beginning January 27, 2025:

Monday/Wednesday 8:30am-7pm  
Tuesday/Thursday/Friday 8:30am-5pm &  
Saturday 9am-1pm

For **ALL** clients, please complete the enclosed Worksheet and bring it with you for this year's filing. **The worksheet included is for returning clients** (a new client version can be found on our website if you will be referring anyone). Filling this out is **required** as it helps us streamline the preparation process.

Please call us with questions and check out our website or Facebook page for more information! We look forward to seeing you in the coming months!

-Bill, Kim, & Matt

#### Russellton, PA, & Wintersville, OH, Offices

Both of our other offices offer drop off services for tax preparation. Please contact these offices directly or visit our website for more information, including location specific hours and documents.