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Dear Valued Client,

As we prepare for the 2025 tax season, we kindly ask that you **drop off or mail your complete tax documents once you have received everything**. Providing all documents at one time helps us meet filing deadlines efficiently and avoid delays in processing.

If documents are submitted in multiple stages due to missing information, **additional processing fees may apply** as a result of the extra communication required. If your tax situation has changed significantly and you prefer an in-person appointment, please contact our office and **Luann will be happy to assist you with scheduling**.

Important Update for 2025:

The IRS will no longer issue paper checks for refunds. **All refunds must be received via direct deposit**, so please be sure to include your banking information with your tax documents.

We are also pleased to announce that **John Gunderud** has joined our firm. John is an **Enrolled Agent (EA)** with over 20 years of tax preparation experience and a bachelor's degree in finance. As an EA, John is authorized to represent clients before the IRS and brings a strong commitment to accuracy, client service, and up-to-date tax knowledge.

If you experienced any significant life or financial changes during the year—such as the sale or purchase of real estate, retirement, marriage, or a notable change in income—please include a brief note describing the change. I will contact you to discuss any necessary details.

Enclosed you will find a **5-page Income Tax Checklist**. **All pages must be fully completed and returned along with your tax documents**. Please be sure to include all supporting documentation for income, deductions, and credits.

Please note that it is the taxpayer's responsibility to provide all necessary information. We cannot be held responsible for penalties or interest related to income, deductions, or expenses that were not reported due to missing information.

Thank you for your continued trust and business. We truly appreciate the opportunity to serve you.

Sincerely,
Patricia Miller