

Dear Clients and Friends,

We need your help to ensure you are fully prepared for this tax season. There have been significant changes affecting 2025 taxes and preparation, so please read this email carefully. Doing so will help make your filing process smooth and efficient.

Getting Started

For security reasons, we do not open email attachments. To upload documents to us, please contact our office to request your personal **2026 VerifyTax Portal link**.

You may also review "**You Can Choose Your Experience**" to see the different ways we can work with you.

Before we begin, please complete the following required forms which are linked for your convenience:

- [Engagement Letter](#)
- [Questionnaire](#)
- [Consent Form](#)

Office details and tax season hours visit our website  [Accounting and Tax Solutions, Inc.](#)

Tax Organizer

If we prepared your **2024 tax return**, we could provide a tax organizer prefilled with prior-year information to assist you in gathering your **2025** information. Please contact our office if you would like one emailed to you. (816) 525-1411 Call.

Fees

Tax preparation fees are based on the complexity of your return and the level of expertise required. Additional fees apply to certain services that fall outside the scope of standard tax preparation fees, including but not limited to:

- IRS or other government notices
- Tax projections
- W-4 assistance for a new job

- IRS audits
- Consulting for new or existing businesses

File Early – Please, Please, Please!

Submit your documents as soon as they are available (often late January). Filing early helps ensure timely completion. Our document cutoff may be as early as **mid-March**, so don't delay. Even if you owe taxes, you may file early and defer payment until April 15, 2026.

Important Reminders

- **Dependents:** If your child plans to file, they should wait until after you file.
- **Claiming a Dependent:** Please include proof the dependent lived with you (school, medical, or official mail). If your dependent did not live with you for at least 6 months, please bring a completed Form 8332 signed by the custodial parent.
- **New Dependent:** Bring a birth certificate and Social Security card.
- **Cryptocurrency:** All crypto activity must be reported.
- **Sale of Personal Items:** If you receive a **1099-K**, include it with your documents.

IRS Updates

- **No Checks Accepted:** By Executive Order 14247, the IRS is no longer allowed to accept checks or issue refund checks. Please bring your banking information. Changes to this policy may still be coming and can be accessed here:
 [Executive Order 14247](#)
- **IP PIN Protection:** If you have not already, consider signing up for an IRS Identity Protection PIN.
 [IRS Identity Protection PIN Sign-Up](#)
- **IRS Online Account:** Access transcripts, balances, and prior filings.
 [IRS Online Registration.](#)

Pay Stubs & Deductions

- Bring **final pay stubs with W-2s** if you receive tips or overtime.
- You may be able to use your personal deductions this year with the OBBB changes. Please bring documentation and totals for:
 - Medical expenses

- Property & real estate taxes
- Mortgage interest
- Charitable donations ( [Non-Cash Charitable Donations Worksheet](#))

Need an Extension?

Contact us by **Monday, April 6, 2026**. Our \$75 federal extension fee applies and must be paid in advance. We will not file an extension without a written request from you.

 [2026 Federal Extension Form](#)

Thank you for the opportunity to serve you this tax season. We look forward to working with you!

Sincerely,

The Accounting & Tax Solutions Team

905B East Langsford Road

Lees Summit, Missouri 64063

(816) 525-1411

You Can Choose Your Experience

We want to make working with us as easy and convenient as possible. Please gather all your tax documents, review the options below, and choose what works best for you.

I. Complete Your Forms

Please read, complete, and sign the [Questionnaire, Engagement Letter, and Consent Form](#). You can get these forms in whichever way is easiest for you:

- Print them from our website under the **Documents** tab (look for the red boxes).
- Pick them up at our office.
- Request that we email them to you.

II. Submit Your Documents

Once your forms are complete, you can submit everything to our office using any of the following options:

- Upload through the secure portal link we provide.
- Drop them off in person during office hours.
- Slip them through our office door slot at any time.

III. Review With Your Tax Advisor

We're happy to review your return with you in the way that feels most comfortable:

- By phone.
- By text, or a combination of the above.
- In Person (will need appointment and depending on availability) May be Fee

IV. Sign, Pay, and Receive Your Return

When your return is ready, you can choose how to finalize everything:

- Pay your fee, download and sign the signature forms from the portal, upload them back, and receive your tax return by email or pick up a hard copy. We prefer not to use USPS for security purposes. (*Payment is required before signature forms appear in the portal.*)
- Stop by the office to pay, sign, and pick up printed copies of your return.
- Use E-Sign if you choose to receive your return by email and pay by phone or through the payment link we provide.