

# READ ME!!

Hello Friends!

January 23, 2026

**Happy New Year!** We're looking forward to serving you this year. To ensure accuracy, efficiency, and timely filing, **we've refined our scheduling and document deadlines.**

**RATES:** Our fee schedule remains the same with the exception of Form 1040, which increased by \$15.

**TAX PREP APPOINTMENTS:** The first available appointment is Tuesday, February 3<sup>rd</sup>. Scheduling is the only way we can regulate the pace and workload during tax season. **Your tax preparation begins only after an appointment or drop off is scheduled with Barbara, our office manager.**

**TAX DROP-OFF & DEADLINES:** To meet IRS filing deadlines, our internal deadlines are as follows.

| TAX RETURNS          | Document Deadline                    | Filing Deadline                   |
|----------------------|--------------------------------------|-----------------------------------|
| S-Corp & Partnership | February 28 <sup>th</sup> (Saturday) | March 16 <sup>th</sup>            |
| Individual (1040)    | March 31 <sup>st</sup> (Tuesday)     | April 15 <sup>th</sup>            |
| EXTENDED RETURNS     |                                      |                                   |
| S-Corp & Partnership | August 28 <sup>th</sup> (Friday)     | September 15 <sup>th</sup>        |
| Individual (1040)    | September 15 <sup>th</sup> (Tuesday) | September 30 <sup>th</sup> ***NEW |

**FIRST COME, FIRST SERVED:** We see clients on **Tuesdays, Thursdays, and Fridays**. The office will be **CLOSED** (NO walk-ins) on Mondays and Wednesdays for uninterrupted tax preparation. We will not accept any tax preparation appointments **after Monday, March 31<sup>st</sup>**. However, we will gladly extend your return, and resume tax preparation appointments on May 5<sup>th</sup>.

- **NEW:** We may ask you to sign a [PoA \(Form 2848\)](#) at your tax prep/drop off appointment. This is our proactive approach to address the alarming increase of [IRS tax notices seen in recent years](#).

**PORTAL:** The portal is not designed for permanent storage; **all tax records sent to and from the portal expire (fall out) after six months**. In other words, you must personally and safely store your own tax returns and records.

**2025 TAX ORGANIZER:** Upon request only, we will send your personalized tax organizer to your portal.

**\*\*\* NEW Policy – Extended (Individual) Tax Returns:** IRS deadline for extended personal returns (*Form 1040*) is October 15<sup>th</sup>, but **our firm will cease tax preparation on September 30<sup>th</sup>**. What does this mean for those of you who extend your personal return?:

- We must have ALL personal tax documents by September 15<sup>th</sup>
  - **We will apply a 20% fee increase if you miss this deadline.**
- You must review and sign your return by September 30<sup>th</sup>.
- We are willing to e-file your tax return as late as October 14<sup>th</sup>.

**\*\*\* NEW IRS Policy – NO Checks Allowed:** The **IRS prohibition on paper checks is now in effect for all tax refunds and payments**, as mandated by [Executive Order 14247](#). What does this mean?

- Tax Refunds must be direct deposited.
- Tax Owed must be paid via direct draft (when we e-file your return) or paid online by you via [IRS Direct Pay](#). In other words, **we will issue no tax payment vouchers.**
- We **HIGHLY recommend** you set up an [IRS Individual Tax Account](#). For our *How To Guide*, [CLICK HERE](#).

**NEW One Big Beautiful Bill Act:** To read IRS summary of bill's provisions, [click here](#).

**\*\*\* NEW Policy – Tax Notice Resolution:** Long gone are the days when we could efficiently resolve IRS tax notices on your behalf. Their AI software is batching notices at an alarming rate ([around 170 million per year](#)). In the past, we could resolve such matters in a few hours spread over a few days. Now, we spend 5-15+ hours spread over weeks, and sometimes months.

- Always send us any tax notice received. We will review it and advise you on the next best step.
- Option 1: You may first attempt to matter yourself resolve the by contacting the IRS or AL Dept of Revenue.
- Option 2: You may require our services to resolve the matter. We will bill you at \$200/hour. Resolution begins once we receive your (1) signed [PoA](#), (2) signed engagement Letter, and (3) retainer fee (starting at \$400).
- We share your frustration regarding this matter because so often, you've received this letter through no fault of your own. Please know, we get no pleasure from this type of billable work. None whatsoever.

**CLOSING REMARKS:** When we can offer your “quick question” a “quick answer”, we are pleased to do that and at no charge. However, often you are best served when you book a one-on-one tax consult. The best time to tax plan is not during the throes of tax season.