TAX PRO SOLUTIONS, INC.

New & Returning Clients!

Existing Clients!

Welcome Aboard and Welcome Back to the New Tax Season!

Thank You for entrusting in our business to serve you!

We, at Tax Pro Solutions, Inc., look to work towards your financial success and meet your tax goals. We accomplish this with our personal experience mixed with our hands-on service and technology.

How we work and what we believe in:

- **READ THIS ENTIRE LETTER CAREFULLY!** – It has answer to all your questions and will avoid any confusion and/or delay in filing your tax return, including going back and forth with us searching for answers or documents.
- We do not prepare your taxes by just relying on our tax software, but we also manually review your returns for accuracy and timely filing.
- We work with our clients via email (no personal sensitive information is shared via email and we expect same from our clients), over the phone, in-person **(By Appointment ONLY),** remote tax filing.
- We use secure client portal to upload and receive your sensitive documents as we take your privacy and security very seriously.
- We do not just work with numbers to complete your tax return; we believe in building long-term relationships with our clients.
- We not only educate our clients about their current tax situation but will also advise how we can work together and look for maximum tax benefits.
- We do not have a magic wand and we are unwilling to push legal limits of the law that would put anyone at risk.
- We do not believe in **"One size fit all",** since everyone's tax situation is unique and so is our fees.
- **All documents must be received by March 15th every year or else extension will need to be filed.** However, if you still like us to file your tax return by due date, **a minimum surcharge fee of $100 or more (depending on the complexity of your return)** will be added to your tax preparation fee**.** Incomplete submission of your documents may delay in filing of your tax return and hence, warrant for an extension filing.

New

New

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REMINDERS FOR UPCOMING TAX SEASON 2025 (Tax Year 2024):

- **Client Portal Documents** – You always have access to the client portal at any time of the year if you remain our client. All the documents uploaded on your account portal **will expire every year on 12/31 and will no longer be accessible after this date**. We encourage you to download the copy of your tax return and save it on your computer and keep one printed hard copy. **A $35 fee will be charged if you require an additional copy of your tax return.**
- **Client Portal Access** – You will enjoy unlimited access to client portal if you remain our client. If you do not return to file your taxes with us the following year, **you will no longer have the access to the client portal after January 15.**
- We provide a copy of your filed tax return either in print form or electronically (uploaded on the client portal). **A $35 fee will be charged if you require an additional copy of your tax return.**
- **All fees are due upfront. We cannot start working on your tax return until the Engagement Agreement is accepted and fees are paid.**
- Complete our Annual Survey for upcoming tax year **(Sent early January every year). The completion of this Survey ensures you will be returning to file your upcoming taxes with us and you do not lose your access to the client portal.**
- Any documents that we upload on your account portal is password-protected and password will always be **"First 4 letter of your last name and last 5 digits of your Social Security Number."**

NEW UPDATES/CHANGES FOR UPCOMING TAX SEASON 2025 (Tax Year 2024):

- **Extension to File Taxes:** If you are unable to file your tax return by the due date, i.e., April 15th, we can file an extension for you. **Remember:** Extension is to file the tax return and not to pay your taxes. All taxes due must be paid by the original due date to avoid any penalties and interest. **A fee to file an extension for an Individual Tax Return is $100 and $250 for Business Tax Return (non-refundable, unless you return later to file your taxes with us and it will be added to your total tax preparation fee).**
- **Tax Documents Submission** – We ***MUST*** receive all your tax documents **by March 15th** to ensure timely filing of your tax return by the due date. If documents are not received by this date, it will warrant an extension to file. However, if you still like us to file your tax return by due date, **a minimum surcharge fee of $100 or more (depending on the complexity of your return)** will be added to your tax preparation fee**.**

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Now, Let's Get Started!

We have provided some common links below for easy access that will be helpful:

Description	Links
➢ Client Portal Login	Link
➢ Portal Profile Instructions	Link
➢ Individual Tax Prep Checklist	Link
➢ Business Expense Checklist	Link
➢ Tips for Smooth Tax Filing	Link
➢ Appointment Calendar	Link
➢ Questionnaire Instructions	Link
➢ Engagement Agreement Instructions	Link
➢ Checklist (See last page)	

Please find below some instructions aimed at facilitating a smooth transition, enabling us to promptly commence work on your tax return once you are prepared to proceed:

1. **Login to Client Portal** – Click here and upload your documents.

   Click here for **'How to complete your Portal Profile'** Instructions.

   (**NEW CLIENTS ONLY)**: You will receive a link in the email to create an account on our Client Portal.

   i) **For New Clients** - Once an account is created, ensure your **"Profile" is complete in its entirety and 'Information is complete' checkbox is checked.**

   ii) **Existing or Returning Clients:** Please log-in to check, especially if you have not accessed our client portal in a long time, to ensure you are able to login. You can reset your password yourself, if needed.

iii) **Client Portal Login** – If you forget your username/password, please click 'Forgot Username/Password' below the login screen. **Note:** The password is your own unique password that you created and is not the same as your document password when you access them from the portal.

iv) **Downloading Documents** – Any documents that we upload on your account portal is password-protected and password will always be **"First 4 letter of your last name and last 5 digits of your Social Security Number."**

v) **Uploading Documents** – Please make sure any documents that **you upload** on the portal is **NOT** password-protected. We do not want you to share your password via any means of communication (i.e., text or email or call or mail) for your own security reasons.

1. **New Clients (REQUIRED)** – You must upload the following documents:
    - Copy of your and your spouse driver's license (front and back). If you do not have a driver's license, any unexpired U.S. Identification or Unexpired Passport
    - Copy of prior two (2) years of tax return (If you do not have a copy, you can upload IRS transcript)
    - See below for dependent documents.

2. **Existing Clients (REQUIRED)** – You must upload the following documents:
    - Driver's license (if expired). If you do not have a driver's license, any unexpired U.S. Identification or Unexpired Passport
    - See below for dependent documents.

vi) **Dependent Documents (REQUIRED):**

a) **New Clients:** You must provide the following documents:

i) Copy of your dependent(s) Social Security Card and Birth Certificate **(required)**

b) **New and Existing Clients:** You must provide one of the following documents every year (**Note**: we may request more than one document):

i) To show both you and your child lived together at the same address for more than half of the year:

- School, medical, daycare, or social service records
- A letter on the official letterhead from a school, medical provider, social service agency, or place of worship that shows names, common address, and dates.

ii) Divorced, legally separated, or living apart from other parent of the child claimed on your return **AND** one or both parents have custody:

- Entire divorce decree, separation agreement, decree of separate maintenance (**NOTE:** If you are living apart from the child's other parents, but you are not legally separated or divorced, send proof that you did not live with the child's other parent for the last six months of the year.
- Current custody order, completed Form 8332 (*Release of Claim for Exemption for Child or divorced or Separated Parents* or similar statements as applicable)

2. **Organizer** – This is a ***required*** document that must be completed every year by every taxpayer. You **must** upload entire Organizer (not separate pages) including blank pages. **It is available in your portal profile early January every year.** Please do not ask us if this is needed, it is **REQUIRED.**

i) This document is available to complete on the client portal early January every year, so we will recommend to start working on it early. It helps you gather all your documents required for the upcoming tax season and help us ask you necessary tax related questions or if any additional documents are needed. **NOTE: Take advantage of our Individual Tax Return Checklist (see the link in Item # 4 below) to help gather your documents**.

ii) **REQUIRED:** (**NOTE:** Page number referenced below is an actual page number in the Organizer)

- All questions ***MUST*** be answered.
- Organizer must be signed in ink (electronic signatures are accepted)
- Page 17 (Personal Information) ***MUST*** be completed and questions on that page must be answered by everyone. **NOTE**: Page number might be different
- Page 18 (Dependent Information) ***MUST*** be completed (if you have any dependents) by everyone. **NOTE**: Page number might be different
- Verify and update your address (if changed)
- Verify and update if your bank information has changed.

iii) Please ensure the Organizer is completed in its entirety. Incomplete organizer will delay the completion of your tax return.

iv) In the current year columns, it is your choice to include numbers from your relevant tax document. **For example**, the numbers from W-2, 1099-INT, 1099-DIV, etc. does not have to be entered but you are most welcome to complete it.

3. **Questionnaires** – These are ***required*** and must be completed every year by every taxpayer. **It is available in your portal profile early January every year.**

- You only have to complete the ones that are relevant to your tax needs and situation.

- Click here for Questionnaire Instructions
- **Required Questionnaire for all taxpayers**:
  i) Direct Deposit Information
  ii) Identification for Taxpayer and Spouse
  iii) Foreign Account and Digital Assets

4. Get ready for the tax season. Here is the link to our
   i) Individual Tax Return Checklist – Click here
   ii) Business Expense Checklist – Click here

5. **Engagement Agreement, Tax Filing Timeline, and Tax Filing Fee**:
   - We will be sending Engagement Agreement and accepting our tax filing fees through BizPayO merchant service, same as last year. In an extreme circumstance and only after discussing over the phone, we might accept other payment options.
   - **All fees are due upfront**.
   - Please ensure you check your spam folder in your email just in case the Engagement Agreement ends up there.
   - Engagement Agreement must be accepted before we can start working on your tax return. **NOTE: We will need minimum of, after Engagement Agreement is accepted, all steps completed (See Checklist below) and fees paid, up to 2-3 weeks to complete your tax return. The complex tax return will require minimum of 4-6 weeks and/or more to complete.**

     - **Simple Tax Return includes, but not limited to, the following:**

     W2, 1099-Int, 1099-Div, Unemployment Benefits, Retirement income, 1099-SA, etc.

     - **Complex Tax Return includes, but not limited to, the following:**

       All documents listed in Simple Tax Return above plus all additional situations such as Itemized, Investment accounts, Rental, Foreign taxes, sale of home, etc.
   - Click here for Engagement Agreement Instructions

IMPORTANT: We cannot start working on your tax return until the Engagement Agreement is accepted, and we received it.

6. Tips for smooth Tax Filing – Click here

7. Appointment Calendar – Click here

CHECKLIST

If you can check all of the following boxes, Congratulations! you are good to go and we will start working on your tax return:

☐Did I complete and sign the Organizer? **(Uploaded in your portal account)**

☐Did I complete and submitted all the relevant questionnaires? **(Available in your portal account)**

☐Did I receive all the tax documents and uploaded them on the portal?

☐Did I upload all required dependent(s) documents?

☐Did I upload copy of my driver's license? For my spouse?

☐Did I complete my portal profile in its entirety and checked 'Information is complete' box?

☐Did I accept the Engagement Agreement? **(Sent via separate email)** Did I Check Spam Folder?

☐Did I already advised my tax preparer that I have completed all the steps?

If you have any questions or concerns, please feel free to contact us via phone 917-892-2571 or email taxesbytps@gmail.com

We look forward to work with you!

Kanwaljit Sujlana (KJ), AFSP

Tax Pro Solutions, Inc. (TPS)