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Dear Client,

Preparing for 2024 income tax returns: The 2025 Tax season is upon us and you should begin placing your documents in a folder and gathering your receipts. Better preparation on your part will assist my proficiency.

IMPORTANT

- Please send me your documents using the email in the heading. **Scanning to a PDF format is requested as images and photos from phones are not clear and cut off pertinent information.** All tax returns will be completed remotely and will be either mailed by USPS, email, or picked up in Montvale.
- I had recommended in a previous email that all taxpayers apply for a 6 digit IP PIN on the IRS website and creating an account on **ID.me**. If you are filing jointly, only one spouse needs to apply.

https://sa.www4.irs.gov/sso/?resumePath=%2Fas%2Fhw6m9zNZ1j%2Fresume%2Fas%2Fauthorization.ping&allowInteraction=true&reauth=false&connectionId=SADIPACLIENT&REF=974D196D6C72971DB40FE0A2550C932BDC57DBC88DA6B14D698900000066&vnd_pi_requested_resource=https%3A%2F%2Fsa.www4.irs.gov%2Fola%2Fprofile&vnd_pi_application_name=OLA

- Upon the completion of your returns you will receive **pdf password** protected copies of your tax returns. Your password will be a **nine (9) digit number** which will be composed of the last **4 digits of your SS# and your 5 digit zip code**.
- **APPOINTMENTS & SCHEDULING.....For those who scan W-2's, 1099's, and other pertinent documents and send me your data electronically, I will be able to prepare your taxes as early as February 1, 2025 from my location in Florida.**
[Use jpapaxle26@outlook.com]
- **ALL NY STATE RETURNS: YOU MUST SUBMIT BOTH SIDES OF YOUR DRIVER'S LICENSE**
- If you are sending me your documents by USPS you may send directly to my Florida address no later than February 28th. If you are mailing after that date please wait to mail to Montvale address after March 15th. For those clients who will be dropping off or scheduling an appointment, I will not be available until sometime after March 15th.

Necessary Documents: (Most documents should be received by February 1, 2025):

Sincerely yours,
John Papa