

Happy New Year from H&S! We wish you all the best as we begin 2025!

Looking back at another year, we find ourselves ever more grateful for the people in our lives that make our journeys so special. Ending 2024 surrounded by friends and family as we celebrated Christmas and the New Year was a welcome reminder that it is our relationships that we hold most dear. As we begin 2025 with the tax filing season, we continue to be grateful for you, our clients, and for the relationships we have built over many years of working beside you. While tax season may be a busy time for our team, we are excited and look forward to serving you in the coming months!

As we start a new year, we continue to strive to positively impact our clients through providing valuable advice. To provide you with the most valuable service, we would love to meet with you to hear what financial goals and aspirations you have and discuss what we can do to help you achieve them! Given the focus on completing tax filings through April 15th, the best time to have these in depth discussions is after we've completed your 2024 tax return. If you're interested in scheduling a meeting with us, please let our team know!

Below you will find important information regarding our process for completing your 2024 tax return. Over the past several years, we have been focused on improving our tax preparation process to provide you with great service and to support our team through this busy season. Through investments in our team and technology, we aim to continue to provide you a personal and efficient experience this tax season. We are appreciative of your patience and kindness this time of year as our team works tirelessly to serve you!

1. Attached, and available via our website, you will find our annual tax questionnaire to assist you with collecting necessary tax documents and confirming relevant figures required to complete your 2024 tax return. To ensure that we completely and accurately prepare your tax return this year, please complete this questionnaire and return it to us with your tax documents. Also enclosed is a summary of key changes in 2024 that may impact your tax position in comparison to 2023. You can also stay up to date on tax law changes and planning opportunities throughout the year by signing up for our weekly tax tips and monthly newsletters at www.hscompanies.com, or by following us on social media.
2. Please provide all your information, completed questionnaire, and tax documents at one time, preferably in a digital format as soon as they are available (Excel or PDF formats, please no .jpeg files). For your convenience, we have invested in a secure exchange to upload your documents on our website (www.hscompanies.com) using our "Client Tools". If you are not able to provide electronic copies, we can accommodate collecting paper copies, which you can mail or drop-off at any of our office locations.

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3. We are committed to reviewing each return for accuracy and identifying planning opportunities to reduce your tax liability. This means we will have limited ability to have in person meetings during tax season. However, as mentioned above, we would love to schedule time to meet with you after tax season to discuss your goals, aspirations, and potential tax planning strategies! Please let our team know if you are interested in scheduling a meeting.
4. Receiving tax documents shortly before the April 15th deadline places a tremendous strain on our team during an already busy season. We are committed to the health and wellbeing of our team members and ask that you understand that if all requested tax documentation is not received by Saturday, March 15th, we may need to file an extension and complete your return after April 15th. If this occurs, we will provide you with an estimated payment voucher to remit payment by April 15th, as necessary.
5. As mentioned above, we can collect paper copies of your tax documents if you are unable to provide them electronically. We ask that you deliver your documents to your local H&S office. If you would prefer a physical copy of these documents, please call your local office (contact information for each of our locations is available on our website).
6. Once your return is completed, our team will contact you to summarize your return and discuss any questions that arise. Our best and most secure method for delivering your completed tax return is electronically via SafeSend. Please provide your preferred email address for communication on the attached questionnaire to facilitate this process. Original documents provided to H&S will be available for pickup at your local office.

Thank you for your continued support - we look forward to serving you soon!

Sincerely,

H&S Companies