



~ Warm New Year's Greetings to You, our Clients and Friends ~  
~ Wishing you all that's good in the New Year ~

We welcome your phone calls, emails, written correspondence, and appointments.  
Our Portal and Ramp Door Mail Slot are always open and secure.

We offer the following to facilitate your tax preparation....

- **2024 Personalized Tax Organizer** (Questionnaire + Worksheets)
  - ✓ PLEASE ANSWER ALL THE QUESTIONS ON THE **QUESTIONNAIRE** – Required of all clients
  - ✓ Returning Clients – Worksheet attachments reflect your 2023 tax information for reference  
(Need Worksheets? Please call our office or go to [www.islandcpas.com](http://www.islandcpas.com))
- **Follow the Guidelines below to keep your Tax Preparation costs down:**
  - ✓ Use your Organizer Worksheets for Data Entry
  - ✓ Please do not enter the same piece of data in two places AND please do not provide Duplicate Forms
  - ✓ Enter TOTALS on Worksheets – **No receipts, please - file receipts at home in case of audit**
  - ✓ Write information clearly and darkly - a BLUE or BLACK pen is BEST
  - ✓ NO POST-IT NOTES, PLEASE - Please use white space for handwritten notes
  - ✓ NO HIGHLIGHTER, PLEASE – It obscures the data when we scan your documents
  - ✓ If you deliver your data in electronic form, we do not need paper copies of those documents
- **You will also need to provide the following Source Data:**
  - **Forms W-2** for wages, salaries and tips
  - **All Forms 1099** for interest, dividends, retirement, miscellaneous income, unemployment compensation, nonemployee compensation, Social Security, state or local refunds, gambling winnings, payment card or third-party network transactions, etc.
  - **Brokerage Statements** showing investment transactions for stocks, bonds, digital assets, etc.
  - **Schedules K-1** showing income from Partnerships, S Corporations, Estates and Trusts
  - **Statements** supporting qualified educational expenses, deductions or distributions, including any **Forms 1098-T, 1098-E, or 1099-Q**
  - **Statements from U.S. Department of Education** supporting federal student loan forgiveness
  - **All Forms 1095-A, 1095-B, 1095-C, 1099-H** related to health care coverage or the Premium Tax Credit
  - **All Forms 1099-SA** and **Forms 5498-SA** for Health Savings Accounts
  - Statements supporting deductions for mortgage interest (**Forms 1098**) or taxes
  - Copies of **Closing Statements** regarding the sale or purchase of real property

(over)

**Vashon Island**

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Friday Harbor, WA 98250

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- **Legal Papers** for adoption, divorce, or separation involving custody of your dependent children
- **Six-digit Identity Protection PIN** if sent to you by the IRS, for use filing your **2024 Tax Return**
- Any **Tax Notices** sent to you by the IRS or other taxing authority that we have not already received

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Once again, please know that the Order of the Day will be **First to Come with Complete Data Packages, Will be the First to be Served!**

Except for late-arriving Brokerage Statements and/or Schedule K-1s, **please bring us your data all at one time** so we don't have to set your file aside to wait, thereby reducing our efficiency.

And finally, we are happy to bring back the **Getaway Weekend Drawing** this year ~ see the enclosed flyer and get your complete data package in to us by **February 28** for a chance to win!

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**~ As always, your Tax Return Filed by April 15 will yield a cash contribution to the  
Vashon Food Bank ~**

**Peter Lake, CPA    Renee Butz, CPA    Carly Christophersen, CPA**  
**Karol Lake        Dayna Jessen        Lisa Huggenvik        Michael Butz**