



New Year's Greetings To All Our TAX EXEMPT Clients!

- Tax Exempt Tax Return **Due Date** - Thursday, **May 15, 2025**
- If you go on **Extension**, filing deadline is - Monday, **November 17, 2025**
- Tax Returns will be prepared on a **First Come, First Served** basis, assuming all data has been received

WE WILL BEGIN WORK ON YOUR TAX RETURN WHEN WE HAVE ALL OF THE FOLLOWING COMPLETED AND RETURNED TO US:

- **Client Information Review Sheet** – Please review and correct as needed
Please choose your Client Copy Format & Sign
- **Tax Preparation Questionnaire** – Please review and respond, providing any requested documentation
- **Officers List** – Please review and correct as needed
- **Future Depreciation Report** – See *Questionnaire*, #18
- **Clean Financial Statements or access to QuickBooks** file that is ready for tax preparation

PLEASE NOTE: To increase our efficiency and lower your cost, please deliver all your requested data at one time AND respond quickly to our questions and data requests.

~ We look forward to working with you. Please let us know of any questions ~

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