

Dear Client,

January 2025

WOW! 2024 marked 30 years for Wasatch Tax!! I am honored with the loyal relationships we have built over these many years. From just starting out to retirement, and everything in between – your stories; the zigs and zags, sadness and joys, lessons learned and accomplishments achieved – continue to inspire me. Many of you have been with me and my family through much of that, and you have allowed me the privilege to be part of your lives, not just your tax returns. I'm fortunate that I still love what I do in this nutty little industry – and I want to offer each of you a very sincere and humble THANK YOU!

My staff is awesome, and I couldn't do it without them! They each have their own roles and responsibilities, and we have procedures in place for getting a final and accurate tax return to you as quickly as possible with the best possible outcome. Just a reminder, Melissa and Dalene run the show in the office – but they do not prepare tax returns, nor are they qualified to answer tax questions. Bryan and I have a combined experience of over 50 years – we are committed to increasing our knowledge, doing proper research, staying current, and navigating the ongoing complexities of tax law. Please feel free to reach out to either of us with your quick questions, or schedule a consultation as needed. Both Bryan and I are available for appointments: I am available on Tuesdays, Wednesday afternoons, and Thursdays. Bryan is available on Mondays, Wednesdays, and Saturday mornings (*Saturdays only through April 12*). We must have all your data at least 10 days in advance of your desired wrap-up appointment time. The enclosed green Tax Prep Agreement (*on the back of this letter*) and all pages of the yellow Questionnaire must be completed and uploaded with your tax information for us to begin tax prep.

A couple of years ago we introduced our SMARTVAULT client portal for a secure, encrypted exchange of tax documents, tax returns, and the E-Signature review for final e-filing - and we appreciate your willingness to work through that transition. We continue to use that system to securely streamline our data intake and back-office procedures. The login link is on the website, but if you have any questions, please call the office. Just a reminder, we will not open email PDF attachments. All/Any documents must be uploaded to your SMARTVAULT portal for us to access whatever it is you are sending over.

As every taxpayer knows, no year is the same as the year before; so, between tax law changes or your own life events, forms and filing requirements will change from one year to the next – which is why we are here to help! Because each return is as different as the taxpayers themselves, you will receive the personalized and specific service needed for your tax issues. The tax preparation fee is based on all forms and worksheets needed to prepare an accurate return. A 1040 with Utah state return base fee is \$345, plus additional fees for whatever additional forms, schedules, and worksheets required to reflect all income, deductions, credits, etc. Business entity returns and trusts will start at \$850, and single-member LLCs (*Schedule C/F/etc*) start at \$400. States other than Utah are approx. \$150/ea. (*Accounting, audit representation, PTE/BOI/FinCen filings, research, consultation, and advance tax planning are all separate services and are not included in tax preparation*).

Just a reminder, we will not do “rush” work. If we have not received ALL your information in a timely manner, an extension will be filed, and we will do our best to estimate if you should pay anything for the deadline, and we will provide payment vouchers if needed. An extension of time to file, is NOT an extension of time to pay taxes. 2024 tax liability must be paid by April 15, 2025. **If you have not provided any tax information to us but want us to submit an extension anyway, we must receive an extension request IN WRITING via email by Apr 10<sup>th</sup>.**

With friendship and gratitude, I thank you again for your continued business and trust. I'm looking forward to another great year with you all. Happy New Year! Best wishes to you and your loved ones in 2025!

*Neala*