

Rawlings Tax Services

December 6, 2024

I want to wish you a Happy Holiday season and Happy New Year!!!

I am excited to let you know that I will continue to prepare your taxes for the 2024 tax season. BONUS YEAR #1!

I want to thank you for continuing to trust Rawlings Tax Services (RTS) for all these years. This will be my 40th year of preparing taxes for others and as I look back, I am truly amazed and blessed for the career I have had and I have all my wonderful clientele to thank for that. Amy and I look forward to seeing and talking with you in the coming months as tax season draws nigh. I am happy to inform you that there will be no base price increase this year to your individual tax return and that I am still offering a referral program where you can find that information below.

OFFICE HOURS:

January 27th through April 14th, 2025: Monday & Friday 9 am –5 pm. Tuesday, Wednesday & Thursday 9 am –7 pm. Saturday 9 am –2 pm. Closed Sundays.

April 15th, 2025: Open 9 am - 3 pm sharp. I do not complete any taxes nor file any extensions on the last day of taxes.

April 16th - Oct 31, 2025: By appointment only.

REFERRAL PROGRAM: The \$25 referral program is a permanent program that is offered. If you want to take advantage of this, please print off a referral slip from the organizer section on my website, fill that out and give to your referred person to give to me. If you have not seen me yet for your taxes this year, I will give you a \$25 reduction on your invoice. If you have seen me already, I will send you a \$25 check. Thank you so much for your referrals.

DEADLINES: Please adhere to all deadlines, no exceptions.

Individual (1040 filers): If you are emailing, mailing or dropping off, please have your information to me no later than **March 31st**. If I do not receive your information by this date and you need an extension, please call Amy and let her know you need one done. I do not automatically do extensions.

Businesses (S-Corps, Partnerships, Corps): You must have your Profit/Loss and Balance sheet statements to me no later than **Feb 28th, 2024**. If I do not receive your information and you need an extension, please call Amy and let her know you will need one. I will also have to do a personal extension at that time as I will not be able to get your business return done until the first or second week of May.

Extensions: I need to know if you need an extension on later than **April 14th**! I will start work on all extended returns the first part of May (after I take a couple weeks off after tax season). If you want an extension please call Amy and we will get you extended.

ENGAGEMENT LETTER - Each of you **MUST read and sign** the engagement letter and return to me with your information you give for me to complete your return. This letter is found on the Organizer tab on my website.

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SICKNESS OR BEING UNPREPARED: In order to protect you and my business, I am asking that you don't make an appointment if you are sick or unprepared. Please **DO NOT** come to the office until you AND your household have NOT been sick for a **full 10 days!** Please call, cancel and reschedule or choose the way of getting me your taxes (see "**Getting me your tax information**" below). Rest assured we will make room for you for a later date, I promise! Thank you for your continued help and understanding!!!!

GETTING ME YOUR TAX INFORMATION – To expedite your and every client's taxes, I will only accept information that is complete. Meaning, if you forget anything, I will not do your return until you have all the info I will need. Do NOT bring or send piecemealed information! The following is how I accept information for completing and filing your tax returns. This can be easily done in four different ways:

- 1) **Set an in-office appointment**- Come to office to have taxes completed as you have in the past. If you prefer, you may drop off and then set a 15-30 minute appointment so I can sit down with you and go over your return. Please bring the signed engagement letter to your appointment or when you drop off your information.
- 2) **Drop off & Pick Up** – You may drop off and pick up your taxes. Expect approximately 2-4 weeks turn around if you drop off & pick up! Please bring the signed engagement letter when you drop off your information. If you decide to use this service, please see the information above for deadlines.
- 3) **Send via the mail** - Send **COPIES ONLY** (not originals as I will not mail these back to you) of all of your information via the mail to, **Rawlings Tax Services, PO Box 609, Osceola, WI 54020**. Please sign the engagement letter and send with your info or your return will be delayed until I receive this. Please see the information above for deadlines.
- 4) **Send via email** to: **info@rawlingstaxservices.com** **I will NOT accept multiple emails of information unless you contact me first and we discuss this!** (Email information gets lost if too many emails are sent). Sign the engagement letter, found on my website, and email with your info or your return will be delayed until it's received. Please see the information above for deadlines.

I **must** have your payment in hand at the time I e-file. NO EXCEPTIONS. Credit cards accepted (5% additional processing charge), or checks or cash! All returns are done on a first come, first served basis.

Thank you for understanding our deadline policies. We look forward to talking and seeing you soon!

Please call **651-646-0417** early to set up your appointment as I fill up fast or if you have any questions or concerns.

Sincerely,

Sue