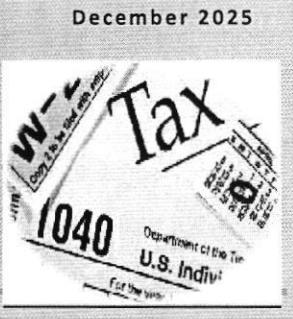


TAX DAY IS TUE, APRIL 15, 2026



Thank you for your business. We look forward to preparing your 2025 tax returns. With limited, case-by-case exceptions we are not accepting new clients. On a related note - we do not prepare partnership, corporate, or estate returns (current clients excepted).

Craig, Dale, Rose, Louise & Julia

IMPORTANT NEWS & REMINDERS

Many changes for 2025

Clean Vehicle Credit: If you bought an electric vehicle, there is the potential for a significant tax credit. Several conditions apply. Provide make, model, year, VIN, dealer name, cost and date of purchase. You must provide documentation from the dealer. This is the last yr for this credit.

Home Energy Credit (doors, windows, furnace, wood burner, solar panels, central air, etc.): '25 is the last year for this credit for improvements made to your residence. Furnaces must be **97%** efficient. Items must be purchased from a Certified Manufacturer to qualify. An ID number is needed for doors, windows, furnaces, wood burners, water heaters and AC units.

Form 1099-NEC or 1099-Misc. If you have business, rental or farm income & you paid anyone \$600 or more, you likely need to issue that person a Form 1099. These forms must be issued by the end of January. We can prepare the forms for you.

WI Sales Tax Returns: Also due by Jan 31st for most filers.

Child/Other Dependent Tax Credit: The credit is \$2,200 per child 16 or younger, and \$500 for other dependents. A college student is your dependent through age 23.

Head of Household Filing Status: You must be able to show that you paid over half the cost of providing a home for your child. Bring in documentation.

Family Member Tax Returns. Don't let your high school and college student children file their tax returns until we do your tax return. We charge \$50 to prepare simple tax returns.

Extension Requests: We do not file extension requests unless you tell us to do so.

WI Retirement Income Subtraction: Up to \$24,000 per spouse. Must be 67 or older.

One Big Beautiful Bill: Tax breaks for Overtime, Tip Income & Auto Loan Interest. You must provide documentation showing your tip income, overtime income & auto loan interest paid. Cars must be brand new & assembled in the U.S. Wis Dept of Revenue does not accept/allow these.

Social Security Deduction: Up to \$6,000 per spouse.

Charitable Donation Deduction: Up to \$1,000 (single), \$2,000 married even if you do not itemize.

Monday, January 5 – Friday, April 17, 2026

Monday – Friday 9 a.m. – 5:00 p.m. (Jan)
9 a.m. – 5:30 p.m. (Feb – Apr)

Saturday 9 a.m. – Noon

Other hours & evening appointments available on request.

Anticipated start date to e-file tax returns is Mon, Jan 19th

Forms & Documents to Bring In

Form 8332. If you are not the custodial parent of a child you intend to claim as a dependent, you must have the custodial parent sign Form 8332 releasing the dependency exemption.

Form 1099-G showing unemployment benefits received. (You probably will have to go on-line and print this.)

Form 1095-A Your marketplace health insurance details.

Form 1099-SA Money taken out of your Health Savings Account

Form 1099-S (Sale of Real Estate). If you sold your home or other property and received this form – we need it.

Form(s) W-2 and W-2G (casino jackpots).

Form(s) 1099-R (Pension/retirement income).

Social Security Form SSA-1099 (the form with the pink box).

Investment Income (bank interest, dividends, etc.) You won't get your brokerage account statement till mid to late February.

Mortgage Interest paid (Form 1098 from each lender).

Direct deposit of refunds – We need your bank info. **No more refunds by check.**

Property taxes paid in 2025.

2025 Property tax bill or Completed Rent Certificate – if you claim the Homestead Credit. (We have blank forms).

Dependent Residency Documentation. We must have some document on file showing that your dependents lived with you in 2025. USPS mail, school documents, W-2's, bank statements, driver's license, etc. will work.

Crypto Currency: If you sold any "crypto", you must obtain the Form(s) 1099-B showing your gains or losses.

College Tuition Credit: We need Form(s) 1098-T for 2025 showing how much tuition was paid.

Child/Dependent Day Care Credit: Bring in proof of payment showing the provider's name, address, ID number, the amount you paid and the names of the children involved.

Quarterly Estimated Tax Payments: If you made quarterly payments we need to know how much you paid, when, and to whom (IRS or WI Dept of Revenue).

Medicare Supplement, Part D, Dental & Vision Insurance: We need to know what you paid for these insurance policies. Wis allows an income reduction based on what you paid.