

PREMIER ACCOUNTING SERVICES, PC

Certified Public Accountants

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Tax Return Procedures for Tax Year 2024

Dear Valued Clients,

It's Tax Time again!

As we step into the new year, we want to ensure you are well-prepared for the 2024 tax season. Below, we have outlined key procedures, deadlines, and updates to help you navigate the process smoothly.

Key Deadlines for 2024

January 31, 2025: Deadlines for employers to issue W2s and 1099s

February 18, 2025: Deadlines for Brokerage Firms to Issue Statements

March 15, 2025: Premier Account Services Guarantee Date. Documents dropped off by this date are guaranteed to be filed on time. Documents dropped off after this day may result in tax returns needing to be extended.

April 15, 2025: Filing deadline. Paperwork may be extended, but payments are due.

October 15, 2025: Extension Deadline

Documentation Submission Methods

1. **Drop-Off:** Place your tax documents in our locked drop box located outside our office at 40 N. Woodbury Road, Pitman, NJ. The drop box is accessible 24/7 and emptied multiple times daily.
2. **Mail:** Send documents to P.O. Box 89, Pitman, NJ 08071. Use priority mail to track delivery. Ensure all documents are removed from envelopes and staples are removed.
3. **Upload:** Log in to your secure Smartvault Portal at www.smartvault.com. Your username is your email and you created your password. If needed, reset your password by selecting "Can't sign in?" For support, contact our office.

Important: Submit all your documents at one time to avoid delays or additional preparation costs. Partial submissions or uploading documents piecemeal will result in processing delays.

Documentation Submission Timeline

Submit your documents as soon you have them all. Typically, early to late February we receive an extremely high volume of client documents and processing times will take longer due to the volume. We will do our best to keep you posted of any significant delays.

- **Deadline:** Documents received after **March 15th** may require filing an extension.

Documentation To Provide

Questionnaire and Tax Organizer: Complete and include the taxpayer information sheet and questionnaire with your submission. These forms can be downloaded from the "Resources" tab on our website www.premieraccountingpc.com or in the Public Documents section of your Smartvault Portal. You may also request a customized organizer to be mailed, emailed, or uploaded to your portal.

Documents Listed on Page 5 of the Tax Organizer: Review the **Tax Preparation Checklist** to ensure that you have included all necessary documents required for preparing your tax return.

Medical Bills, Expenses, and Donations: Provide a single total for each category instead of submitting individual receipts or confirmations.

Additional Information

If we have questions while processing your return, we will contact you by phone or email. If necessary, we'll schedule a call or Zoom meeting to discuss any issues.

Finalizing and E-Filing Your Return

- Review and Sign Form 8879:** Once your return is complete, a copy will be uploaded to your Smartvault Portal for review. The Form 8879 Authorization to E-file will be sent to you through one of the following methods:
 - Electronically via DocuSign.
 - Mailed to you.
 - Available for pickup at our office.
- Sign Before Filing: Do not sign Form 8879 until all questions or concerns about your return have been resolved.** Signing this form authorizes us to electronically file your return. Contact our office to address any questions before signing.
- Submission:** After receiving your signed Form 8879, we will e-file your return.

Contact Us

If you have any questions or concerns, feel free to reach out to us at (856) 256-0330 or through an email to your tax preparer.

Sincerely,

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Michele Cressman and the Staff of Premier Accounting Services, PC

We appreciate you and look forward to assisting you this tax season!