StrubeCPA Tax Season 2024

Client Information

Hello and welcome to Tax Season 2024! We are excited to work with you.
Please see the information below to ensure timely & accurate filing.
In this document, you'll find Important Date & Deadlines, Expectations, Client Tools & Software, What to Upload and Where to Go for Questions or Help.

Important Dates & Deadlines

- **Feb 7, 2025 Upload Initial Tax forms**
  - Most tax forms (except for K-1s and brokerage 1099s) should be available by January 31.
  - Login to ALL of the employee/student portals and bank/loan accounts you have to check for tax forms (they won't all be mailed). Download/collect and scan/upload your tax documents (any situation where money came to you).
  - We need ALL of the forms you receive.
- **Feb 18, 2025 Upload investment forms**
  - Investment forms should be available by February 15. You may get later emails about corrected forms. Upload those to TaxDome when/if you learn about them.
  - Log in to all your investment accounts and grab your tax documents (1099-B and/or 1099-DIV and any "supplemental tax document/notice," if applicable).
- **Feb 28, 2025 StrubeCPA S-Corp Client Acceptance/Upload Deadlines**
  - If you have NOT accepted your proposal by this date, we will presume that you are not returning as a client. We will withdraw the proposal and begin archiving your account.
    - Your TaxDome account will be archived on Apr 17, 2025, to ensure you have sufficient access to download your last year's returns. If TaxDome access is needed after that date, we do charge a $150 reactivation fee.
  - If you *have* accepted your proposal and remitted your deposit, but your books are not reconciled or other documents/questions remain outstanding, we will begin putting your returns on extension to protect you from late filing penalties.
- **Mar 17, 2025 S-Corp Tax Filing Deadline**
  - We have a firm policy not to file on deadline day. Mistakes happen when things are rushed at the last minute. If we do not have your DocuSigns completed and returned to our office by noon the business day prior, your returns will be extended.
- **Mar 28, 2025 StrubeCPA Individual Client Acceptance/Upload Deadlines**

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    - If you have NOT accepted your proposal by this date, we will presume that you are not returning as a client. We will withdraw the proposal and begin archiving your account.
        - Your TaxDome account will be archived on Apr 17, 2025, to ensure you have sufficient access to download your last year's returns. If TaxDome access is needed after that date, we do charge a $150 reactivation fee.
    - If you *have* accepted your proposal and remitted your deposit, but your tax documents/questions remain outstanding, we will begin putting your returns on extension to protect you from late filing penalties.
- **Apr 15, 2025 Individual Tax Filing Deadline**
    - We have a firm policy not to file on deadline day. Mistakes happen when things are rushed at the last minute. If we do not have your DocuSigns completed and returned to our office by noon the business day prior, your returns will be extended.

Expectations

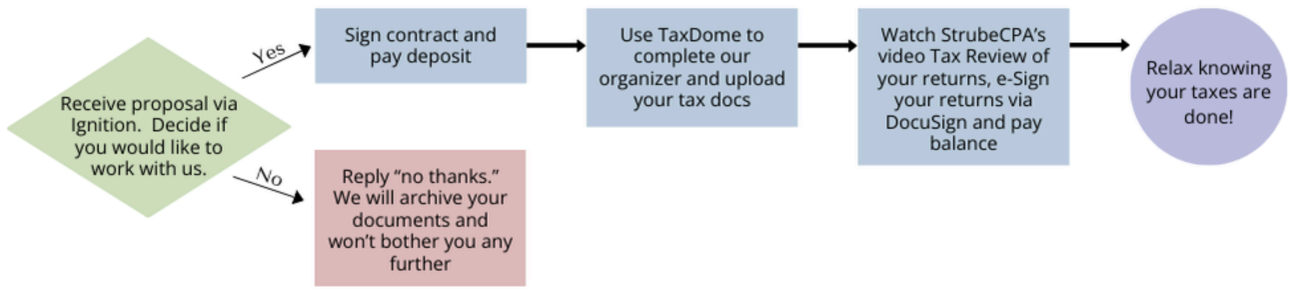
In order for us to serve you and all of our clients well, we expect you to complete your organizer, upload your tax documents, and respond to our follow-up questions *timely* (for follow-up questions or document requests: about one week maximum).

We do not start your returns until you have represented to us that you've looked for and provided us with ALL of your tax information. Multiple touches are inefficient and increase the risk of errors.

We will *generally* finish your returns **within two weeks** of you providing all of the information we need to complete your tax returns. We aim to *keep you updated through the status visible to you* in TaxDome.

Client Tools & Software

StrubeCPA Client Experience



Ignition - Ignition is our proposal, engagement letter and billing system. You will be emailed a proposal to sign, and enter your billing information (this is securely encrypted and stored through Stripe–we don't have direct access to it) to remit deposits. This is required before we can do any work on your tax returns.

TaxDome - Secure Client Upload Portal - TaxDome is our secure client portal for communication and uploading documents. Do NOT email documents to your tax pro (IRS security standards deem email as not secure). You can upload and access files through the TaxDome web portal or app (iOS or Android). Utilize the TaxDome app to easily scan your documents and check the status of your tax returns. Need help navigating TaxDome? Check out this video. Written instructions are available here.

In addition to uploading your tax documents to TaxDome, each client also needs to complete their annual **Organizer** (also in TaxDome) to make sure StrubeCPA has all the information to accurately prepare your tax return. You will be sent a link to that once your Ignition proposal has been signed.

DocuSign - Once your returns are complete, you will be sent a **Loom** video review (via TaxDome) where Karl walks you through the "story" of your tax return this year. This is the stage where we also bill your payment method on file (with Ignition) for any remaining balances due to the firm. You can ask questions or book a meeting if needed. You will *not* be pressured to sign anything that you don't agree with. Once you've reviewed your return, you will sign your return via DocuSign allowing us to send the return to the various taxing authorities.

What to Upload

Tax Forms to Upload

- ☐ 1099-B/DIV
- ☐ Any and all W-2s
- ☐ Any and all 1098 Mortgage Interest
- ☐ 1098-E Student Loan Interest
- ☐ 1098-T Tuition
- ☐ 1099-R
- ☐ 1099–MISC and/or 1099-NEC
- ☐ 1099-INT
- ☐ Any other 1099s (K/Q/SA or other)
- ☐ SSA1099
- ☐ 5498-SA
- ☐ 1095-A (for Covered California; 1095-B & -C are **not** needed)

Additional Items

- If you have a Health Savings Account (HSA; *not* FSA):
  - ☐ Your **year-end paystub** (in addition to your W-2)
  - ☐ An **annual or year-end statement of HSA account activity**
- ☐ **Property tax statements** if NOT escrowed through a mortgage
- ☐ **Closing statements** pertaining to real estate transactions
- ☐ **Summaries of activity for businesses and/or rentals** (summaries of expenses by category only, not individual receipts)
- ☐ **Summaries of cash donations** (summaries of expenses by amount and non-profit only, individual receipts not needed)
- ☐ **Any tax notices** received from the IRS, Franchise Tax Board or other taxing authorities
- ☐ If you are expecting any K-1 forms not prepared by StrubeCPA, the timing of those is nebulous, and your returns may need to go on extension.

What if I have questions or need more help?

Contact Rachel at hello@strubecpa.com if you need help with the following:

- Navigating any of StrubeCPA's tech tools (TaxDome, Ignition, DocuSign, Loom)
- Have questions about specific tax forms and what to upload
- Have questions about billing or need to make any changes to your personal information
- Need to request an extension
- Have feedback for StrubeCPA

If you have tax or other questions for Karl, it's best to book a meeting with Karl using his scheduler (https://go.oncehub.com/KarlStrubeCPA) and put your questions in the meeting request, an e-mail or a TaxDome chat.