



call/text: 973-934-2500

fax: 973-447-3555

mailing address: PO Box 151, Haskell, NJ 07420

website: dedicated-taxes.com

e-mail: info@dedicated-taxes.com

It's that time of year again! We hope you had a great year and happy holidays! We look forward to speaking with you to catch up, discuss your year and answer any tax questions you might have.

Here are some reminders on how to send your tax documents:

We can receive your confidential paperwork in the secure ways below.

- **Online Encrypted Secure Portal** – MUST USE ADOBESCAN OR CAMSCANNER to send **pdfs** of your documents; we cannot accept pictures (jpegs) of tax documents. Documents are stored for 3 years in the portal.
 - **The client portal link is always on our website.** You can upload all your documents here and have access to your tax returns year round.
 - **If you need a portal login:** Please call/text/email your first & last name with your email address. An email will be sent to you from ShareFile with an activation link. We will also send a confirmation email & text to be sure you receive it. Through the activation link you can create a login, upload your tax documents and download taxes and tax documents.
- **Fax** your documents to 973-447-3555
- **Regular/Overnight Mail** – Please use our mailing address above
- **In person appointments** – Stop by to drop off documents and talk (have some chocolate!). Call, text or e-mail to request an appointment.
PLEASE NOTE: We have 2 very friendly dogs who would love to be a part of our meeting but are trained to leave the tax interviews to me!

DOCUMENTS WE NEED:

- **2024 Tax Checklist** – This is on the [Forms page](#) of our website. Please fill out and include with your documents.
- **Tax documents** – Most common types of forms are W-2's, 1099's, K-1s, 1098, etc. Your last paystub of the year is also very helpful.
Some special considerations:
 - Marketplace Insurance?– If so, you will receive a Form 1095-A in the mail or you can download the form from your account. Your taxes cannot be completed without this form.
 - Unemployment – go to your State login and print out Form 1099-G
 - School Tuition – go to your school(s) login and print out Form 1098
- **Prior Year Tax Return & copy of driver's license** – If you are a **new client** (*welcome!*), please provide a copy of your prior year tax return (2023) and a copy of your driver's license (also spouse's, if applicable)

PAYMENTS: Zelle (973-934-2500), cash or check are our preferred payment methods. We accept credit/debit & Venmo with an additional fee. Payment is due prior to electronic filing of your taxes.

Please initial on the Checklist if you want this important PERSONAL PROTECTION COVERAGE:

In 2022, the Inflation Reduction Act was signed into law which gave the IRS an increase of \$80 billion half of which was allotted for enforcement.

Having our Personal Protection Coverage means **we will respond to all IRS and State audit letters** regarding your 2024 tax return. This will allow you to avoid paying hourly rate fees. This coverage will last for 3 years from the date of the filing of your tax return for only \$29 (\$10 per year). Don't miss out!



As always, just a reminder that we are here for you year-round for any tax questions you have. Even if you don't get the coverage above, we can still help you resolve any IRS or state audit letters. DO NOT pay an audit letter unless you have us look at it first. Our review of the letter and recommendation on how to proceed are free. You may avoid payments by amending your return or submitting information. Letters can be written, and penalties can be abated.

Please let us know if you have any questions. We look forward to hearing from you soon to file your 2024 taxes!

Sincerely,

Renée Kroll