

2025 Tax Season Letter

I hope you had the Merriest of Christmases, and we wish you a year full of blessings in 2025!

To save time and ensure accuracy for any changes you may have had since last year; we ask that you complete the intake/interview sheet found on the website and bring it to your appointment or include it when you provide us with your documents.

Again, this year we are trying to be flexible to accommodate our clients' specific needs and preferences, making the most efficient use of our short season and respecting your precious time.

Kim schedules mostly in-person 60-minute appointments. You can drop off ahead of time or schedule a follow-up for business returns and more complex returns that cannot be finished within the hour.

You may be able to use the self-scheduling link on our website www.apssiouxland.com to schedule 60 minutes with Kim. If you are scheduling online with Kim, please make sure if you have more than one return you make a 60-minute appointment for each return. This feature is not compatible to schedule with Angie.

In order to accommodate all of our clients in the short 10 weeks of tax season we would again like to encourage everyone who can to provide us with documents 4-5 days ahead of time, and then schedule a 15-30-minute follow-up via phone, virtual TEAMS meeting or in person. Or you can bring your documents to us for a shorter drop off appointment, we can discuss anything necessary and then get back together briefly when finished – either in person or phone.

If you are not sure who you should work with, or if you are having trouble with the self-scheduler and/or do not know how much time you will need, please call our office and Ashley will be happy to assist you. When making your appointments, please let Ashley know which preparer you prefer to work with or if you just want the first available and some indication of the complexity of your return and if you will be wanting additional time for particular questions and/or consultation. We can assist you with answers regarding payroll withholdings, managing refunds/balances due, retirement planning both contributing and withdraw strategies and other tax implications for family and life situations. If you would like to have these conversations during tax season, it is nice to plan enough time during your appointment, or you can always reach us after season. We can do signatures and payment electronically.

NOTE: PLEASE DO NOT SENSITIVE INFORMATION OVER REGULAR EMAIL!!!! See below for important document sharing information!!

Document Submission: You can submit your documents either by dropping off, mail or upload to Secure File Pro, our secure integrated information sharing portal. **For your safety, please do not send us sensitive information over plain text or unsecure email...for electronic submission please use our secure portal.** It really is super easy. You receive an email from us, you create a password, you snap pics of your docs straight from your phone, (then delete them off your phone), choose your preparer and upload. If you are needing a portal invite or to activate your current portal, please call Ashley, email ashley@apssiouxland.com or text 712-224-2942 with your current email and name. You can also upload without an account by going to www.apssiouxland.com and uploading to our guest exchange. ***We do ask that you make your best effort to wait to upload until you are fairly certain you have all your needed documents and send them all at one time.*** If you do not have a specific preparer, just choose Ashley as your preparer during upload.

Audits WILL go up. If you wish, **we are offering optional audit protection for an additional \$75.** We will

not be pushing this, so if you are interested, please let us know when you send us your information.

Dependents:

We will also be charging a minimum fee of \$100 for preparing the returns of client's dependent children. There is an option to file for \$25 online through a link on our website www.apssiouxland.com at the bottom of the page click 1040.com.

The IRS's Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) offer free basic tax return preparation for individuals who qualify based on income for their services.

Looking forward to seeing you soon!
Angie Anderson, Ashley Ross, Kim Rose

www.apssiouxland.com **Sioux City: 712-224-2942 Cherokee: 712-225-9027**