



New Year's Greetings To All Our Partnership & *LLC Clients!

- ****URGENT: Did you file your BOI Report with Fincen?***
- Partnership & LLC Tax Return **Due Date** - Monday, **March 17, 2025**
- If you go on **Extension**, filing deadline is - Monday, **September 15, 2025**
- Tax Returns will be prepared on a ***First Come, First Served basis***, assuming all data has been received

WE WILL BEGIN WORK ON YOUR TAX RETURN WHEN WE HAVE ALL OF THE FOLLOWING COMPLETED AND RETURNED TO US:

- ***Client Information Review Sheet*** – Please review and correct as needed
Please choose your Client Copy format & sign
- ***Tax Preparation Questionnaire*** – Please review and respond, providing any requested documentation
- ***Future Depreciation Report*** – See *Questionnaire*, #13
- ***2024 Form W-3***, if applicable
- ***Clean Financial Statements*** or access to the ***QuickBooks*** file that is ready for tax preparation

PLEASE NOTE: To increase our efficiency and lower your cost, please deliver all your requested data at one time AND respond quickly to our questions and data requests.

~ We look forward to working with you. Please let us know of any questions ~

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