

Beth Kissinger

Certified Public Accountant

275 Saratoga Road
Glenville, NY 12302

Visit me at: BethKCPA.com

Phone (518) 399-4510

Fax (518) 399-6740

email: Beth@BethKCPA.com

2025 CLIENT LETTER

Dear Tax Client:

Happy New Year!! As 2026 begins my thoughts naturally turn to the upcoming tax filing season and assisting you with the filing of your tax returns.

I am happy to see 2025 come to a close for a number of reasons and I look to 2026 ever so optimistic that it has to be better. As many of you know, I lost my long-term canine partner Daisy quite suddenly in January 2025 and my heart broke, as did Stella's. Luckily, Stella has agreed to continue her canine duties as office security, therapist and best friend in 2026 for the mere price of a treat.

Since I will once again be working without human assistance, I appreciate you understanding that to achieve my goal of staying healthy (physically and mentally), my accessibility must be limited. There will be **no entry** allowed into my office for **ANY unscheduled (drop-in) visitors**. If you don't have a prescheduled appointment, you should not expect to be allowed entry. While I love visiting and catching up with each of you, unfortunately, my schedule just can't handle multiple interruptions throughout very busy tax season days.

I have posted all my standard tax prep items (standard forms, year-end letters, questionnaires and generic organizers) on my website. I ask that you download anything you need at BethKCPA.com. While at the website, be sure to read the information about preparing your returns and how to provide your information. The **2025 Tax Preparation bundle** and other pages contain all the items I request you to complete, sign, etc. Everything is labeled for you to easily find and print if needed. While you are at the site, check out the monthly newsletters. They contain some great information and suggestions.

Other items on the website have a tremendous amount of information pertaining to current tax law, changing tax law, and ideas for saving some tax money. Who doesn't want to save some tax money?!

For 2025 returns we will deal with a lot of new tax law. ***The One Big Beautiful Bill*** – passed July 2025 comes with a multitude of changes; **everyone** will be affected in some way. There are too many changes to address here, but it will result in more people starting to itemize with SALT limits significantly increased, TRUMP accounts with **free money** of \$1,000 for babies born in 2025, increased deductions for seniors, nontaxable tip and overtime pay, etc etc etc. Guidance is still lacking on dealing with many items included in the law so I would not be surprised if filing some returns is delayed as more legislation may be on its way in January 2026 that will affect 2025 returns. OH BOY. I would suggest you read the prior month Newsletters on my website to get an idea of the magnitude of changes regarding this new tax bill.

My questionnaire is longer this year to account for the changes in the tax law. I did add some bonus "fun questions". Also, my services letter has expanded by a number of pages as well.

In an effort to keep steady with inflation, ever changing federal and state filing and reconciliation requirements, you should expect my fees will be approximately 30% higher than last year with a minimum increase of not less than \$150. Additional charges will be incurred for service requests including but not limited to: 2026 tax planning, estimated tax calculations, IRA/HSA/ retirement funding savings calculations, responding to emails,

appointments, missed appointments, accounting services, postage, requests for last minute tax services and extension preparation. If your current year filing requirement differs significantly from the prior year, your fee will be further affected. I will be accepting credit card and ACH payments this year.

I handle all returns on a first come first served basis. If you are unable to provide all of your information prior to March 10, 2026 an extension should be expected and a premium fee for my services should be expected.

The IRS has indicated they will no longer accept checks for payment of taxes due or issue checks for refunds in 2026. You must provide banking information for direct deposit and direct withdrawal. This is a change we must comply with whether we agree or not.

Completed returns and any original information provided will be returned to you via USPS with tracking. Electronic copies can be posted to your client portal (for anytime retrieval).

Remember, failure to timely provide all the information requested, and/or failure to complete the **ENTIRE** questionnaire and **ALL** worksheets provided, will delay the processing of your returns, result in a higher preparation fee and may result in missed deductions, higher income taxes, penalties and interest. Please help me to do an efficient job for you as painlessly as possible.

I am looking forward to assisting you in 2026. I would be happy to discuss any item of concern or interest you may have pertaining to the current or proposed tax laws, or any of the information in the enclosed package. Best wishes for a happy, healthy and prosperous 2026!!

Sincerely,

Beth

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