SCHUMACHER SAMA CERTIFIED PUBLIC ACCOUNTANTS

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December 16, 2025

Dear Valued Clients:

Welcome to the 2025 Tax Season! We're excited to begin working with you and have outlined some key information below to help ensure a smooth and efficient filing process. Please read carefully as some details may have changed:

Tax Organizer - Enclosed is a personalized tax organizer that will be helpful in gathering necessary information to prepare your individual income tax return. Please fill this out to the best of your ability. If you received a specific tax form in prior years but are *not* expecting it this year, please cross it off in the organizer. This helps prevent unnecessary follow-up and keeps your return moving forward.

Confirm direct deposit information - Please be sure the banking information is completed, accurate, and current to receive your tax refund(s).

*****Please note* **-** We will need to automatically file an extension if we receive your information after March 16th, 2026.*

Electronic Filing & Billing Policy – Once we receive your signed Form 8879 (electronically or via paper), we are required to electronically file all eligible returns. Please note that invoices for our services are due upon receipt, and we cannot file your return until the associated fees have been paid.

Sending Information to Third Parties - Due to the IRS Privacy Policy, we will not send any information to third parties without your **written** consent.

Documentation - Your original paper documents will be returned to you.
The documents listed below are a ***guideline*** of the forms we need from you:

•Wage Statements from Employers (Form W-2)
•Dividend Income Statements (Form 1099-DIV)
•Interest Income Statements (Form 1099-INT)
•Miscellaneous Income Statements (Form 1099-MISC)
•Statements of Retirement Plan Distribution (Form 1099-R)
•Proceeds from Real Estate Transactions (Form 1099-S)
•Payment Card & Third-Party Network Transactions (Form 1099-K)
  o Additional information regarding the nature of the payments received is required
•Proceeds from Broker and Barter Exchange Transactions (Form 1099-B)

•Mortgage Interest Statement (Form 1098)
•Social Security Income (Form SSA-1099)
•Long-term Care Benefits (Form 1099-LTC)
•Distribution from HSA or MSA (Form 1099-SA)
•Qualified Education (Form 1099-Q)
•Tuition Statement (Form 1099-T)
•Gambling Winnings (Form W-2G)
•Health Insurance Marketplace Statement (Form 1095-A)
•Health Coverage (Form 1095-B)

Other Information:

•If you have an investment in an S Corporation, LLC, or Partnership, enclose Schedule K-1s from each entity.
•Statements regarding tax exempt interest (municipal interest income) received during the year.
•If you sold real estate, please enclose the closing statements for both the purchase **and** sale.

Once we've received your information, here is what to expect next:

Our Client Excellence Coordinating team will check in your return within 1-2 business days. If any additional information is needed, someone from our office will contact you with requests for missing details or if there are any questions. Once your return has been prepared, it will go through two levels of review—first by a tax manager and then by your designated partner. After the reviews are complete, the 'CEC' team will assemble your return and contact you by phone or email to let you know that your taxes are ready for electronic signature, have been mailed, or is available for pickup at our office.

Although we strive to complete your return as quickly as possible, the process typically takes 2-3 weeks once we have your completed information and signed engagement letter.

We appreciate this opportunity to serve you! If you have any questions, please feel free to call our office directly or email ssmail@schumachersama.com to reach a Client Excellence Coordinator.

Sincerely,

Schumacher Sama, LLP

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