ABLRE TAX
ASSOCIATES

January 2025

Income tax season is here again.

Thanks for choosing ABLRE TAX to prepare and file your returns.

Complete and sign the enclosed questionnaire, sign the second page of our engagement letter (for a joint return, both spouses must sign) and **return the forms with your tax documents. A signed engagement letter is required to begin preparation services.**

For your convenience, the entire process can be done through our **new** secure portal. All we need is your e-mail address(es). Request a link today. Please do NOT send any tax information by unsecured email or text. Note that we have changed portal providers.

DO NOT USE ONVIO. We can no longer access any information in Onvio.

After you have collected most of your documents, **mail, upload or drop off your tax information to our office**. Late-received tax forms (K-1s, brokerage forms, corrected statements) or additional requested information can be dropped off after we start your preparation. Your preparer will be in touch with you with questions or missing information.

To file by the due date, we must receive all required documentation **by March 21, 2025.** If this is not possible, we will file an extension and complete your taxes after April 15th. Note that this extends the due date to file, but all taxes are still due by April 15th. We will prepare extension payment vouchers, if required.

If you know you will require an extension, notify your preparer by March 21st. We can efile extensions, but do not do so automatically.

We look forward to hearing from you soon. Gather your tax statements that have come in the mail, download any statements that you need to access on-line, review the checklist on the back of this letter and let the experienced tax professionals at ABLRE TAX relieve the stress of tax filing for you. Call us if you have any questions. We appreciate having worked with you in the past and are ready to assist you with your tax preparation again this year.

All of us at ABLRE TAX Associates 608-827-4780

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As you collect your tax information forms and records, review this checklist to make sure nothing has been omitted. Be sure to include any tax forms that you need to access from on-line accounts.

Tax Information Check List:

Current address, phone number and e-mail address.
Current bank account information, for direct deposit/direct debit.
Any change in marital status or change in dependents' status.
Name, date of birth, and social security card of any new dependents.
Six-digit Identity Protection PIN if sent to you by the IRS and/or WI Identity Protection PIN.
W-2 forms from all employers.
1099 forms from all payers of interest, dividends, pensions, and other miscellaneous income.
Miscellaneous income received - including alimony, awards, grants, prizes, gambling, barter, tips, foreign income, and **virtual currency**.
If you received Social Security, form SSA-1099 showing how much you received for the year.
Unemployment compensation reported on form 1099G.
HSA contributions/distributions; IRA contributions/rollovers/conversions
Form K-1 from partnerships, S-corporations, trusts, estates, etc. (Note that these often do not come until March; please bring everything else in early!)
For each stock, bond, or mutual fund sold during the year, we need form 1099-B, the date it was purchased and its cost.
Details of any energy-efficient improvements to your home that are credit eligible.
Sales receipt from purchase of credit-eligible clean vehicles.
Forms 1095-A from Marketplace health insurance coverage or the Premium Tax Credit.
If you bought or sold any real property and/or business assets, please bring the closing statements from both the purchase and the sale.
If you own your home, the statement of the amount of mortgage interest (Form 1098) and property taxes actually paid during 2024. Or the total amount of rent you paid in 2024.
The amount of any qualified charitable contributions made in 2024. If the total of all your noncash (property) contributions is over $500, bring the receipt(s) from each of those charities.
Information about any qualified educational expenses paid, including Form 1098T, 1099-Q, and receipts.
Work-related child/dependent care expenses and provider information.
All estimated taxes paid in 2024 and January 2025, listing the dates and amount paid.
Information about Foreign Bank Accounts/Foreign Financial Assets you have.
Amount of health insurance or long-term care insurance premiums you paid.
Total of internet/out of state purchases subject to Wisconsin Sales and Use Tax.
If you usually receive a Homestead Credit, a copy of your 2024 property tax bill, or a rent certificate filled out by your landlord.
Any other information that may pertain to your tax return. Review your 2023 return for special items.
Your prior year tax return, if not prepared by this office. Please provide Social Security cards and birthdates for all individuals on your return.