

# 2025 FILING SEASON GUIDELINES

Our tax season guidelines are designed to ensure a smooth, efficient process and allow us to deliver accurate, high-quality service to our clients.

Please review our updated pricing, document submission guidelines, turnaround times, and important deadlines.

## Information Submission Requirements

To ensure timely and accurate preparation, all tax information must:

- Be submitted **together**, using **one delivery method** ([Secure portal preferred](#))
- Include all documents necessary to prepare a **final draft** of the tax return ([Click here](#) for a list of documents typically needed)

Incomplete, piecemeal, or unorganized submissions will delay preparation and may require an extension if requested information is not received in a timely manner.

## Turnaround Time

When complete information is received, clients can expect:

- **Approximately a two-week turnaround** for tax return preparation

## Tax Season Submission Deadlines

To allow adequate time for review, questions, and quality control, we require complete information to be submitted **no later than three weeks before the filing deadline**.

**Firm deadlines are:**

- **February 23, 2026** – Business returns (Partnerships, LLCs, S-Corporations)
- **March 25, 2026** – Individual, Estate, and Trust returns

This timeline ensures we can thoroughly review returns, address tax-planning opportunities, and deliver a high-quality product by the filing deadline.

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## Late Submissions, Extensions & Rush Requests

Submitting complete information by this date allows us to prepare and file your return by the IRS April 15 deadline.

If complete information is received after March 25, 2026:

An automatic extension will be filed (no additional fee), and your return will be completed after April 15 following our normal processing timelines.

### Rush Fee (Optional):

A \$500 rush fee applies only if you submit complete information after March 25 and request that your return be completed before April 15 (i.e., you do not want to file an extension).

### Estimated Payments with an Extension:

If you typically need an estimated payment calculated with your extension, please contact our office well in advance of the March 25 deadline.

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## Print & Delivery Fees

Due to increased administrative, printing, and mailing costs, the following fees apply to paper returns:

- **\$25** – Printed return (pickup)
- **\$45** – Printed and mailed return
- **\$35** – Additional printed copy
- **\$55** – Additional printed and mailed copy



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## Minimum Fees & Hourly Rates (Effective January 1, 2026)

Our minimum pricing and hourly rates have been updated to reflect the increased complexity of the current tax environment and the additional planning and oversight required.

If a return is currently priced below minimum or market value, fees will be **gradually adjusted** to align with minimum and market rates. Each client situation is unique, and adjustments will be made thoughtfully.

### Minimum Fees:

- Business returns: **\$1,500**
- Individual, Estate, or Trust returns: **\$625**

### Hourly Rates:

- Accounting: **\$150/hr**
- Peter – Advisory: **\$200/hr**
- Leane / Chris – Advisory: **\$375/hr**
- Administrative: **\$75/hr**

Please contact our office if you have any questions regarding these guidelines or how they apply to your engagement.

