



## TAX PREPARATION SERVICES

### IMPORTANT DEADLINES

- **4/15/25**—IRS TAX FILING DEADLINE
- **3/27/25**—TAX FILES MUST BE RECEIVED AT PWM TO GUARANTEE FILING BY IRS DEADLINE. FILES RECEIVED AFTER 3/27/25 WILL BE FILED ON EXTENSION.

### CRITICAL ITEMS FOR TAX PREPARATION

- Valid state issued photo ID
- A complete copy of the previous year’s returns
- All forms W-2, 1099 & 1098
- Property tax receipts
- Detailed income and expense information for small business and rental real estate
- List of charitable contributions (date, amount & name of charitable organization.)
- Any additional information pertaining to the current tax year

### 2025 TAX PREPARATION PRICING\*

SILVER	GOLD	PLATINUM
Starting at \$195	Starting at \$350	Starting at \$650
“Touchless” tax preparation	30 minute live review	
Deadline to submit tax docs: 2/21/2025	Deadline to submit tax docs: 3/20/2025	Comprehensive tax planning

### TAX FORM MAILING DATES

Investment related tax documents such as **consolidated 1099's will generally not be mailed until late February**. If you hold securities (usually mutual funds) that report undistributed capital gains, these gains will be reported on a form 2439 which will not be mailed to clients until **mid March, 2025**.

\* Additional fees may apply for engagement outside the scope of the pricing schedule.

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