

JILL W. LEOPOLD LAW, LLC

Jill W. Leopold

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Larry E. Leopold
Retired

DO NOT DISCARD!

**IMPORTANT REMINDER REGARDING 2024
TAX SEASON CHANGES**

January 2, 2025

To all our valued clients,

It is hard to believe 2024 is here and another year has flown by. We hope this year brings success and happiness to each of you. As tax season 2024 approaches, we at Jill Leopold Law are reaching out to let you know about some procedural changes and friendly reminders for next season. Please carefully read this letter so you will be prepared for tax season.

Inside this packet you will find an engagement letter to reserve your spot for the 2024 tax season.

Clients who wish to use our services for the 2024 tax season (January-April 15, 2025) should sign an engagement letter, either at the time of drop off or at the appointment. The signed letter indicates your intent to use our business and allows us to better plan for staffing and time management.

Secure Portal for Document Upload

We have a secure portal if you wish to use it. It allows you to upload your tax prep documents instead of dropping them off at the office. It also allows us to upload your finished tax documents, so you have easy access to them. To get the portal we need a valid e-mail address so we can send you a link for you to create a username and password. After you send your document to the portal if you could please send up a e-mail to: marie@jillleopoldlaw.com, just so we do not miss the documents that you have sent us.

“After Hours” Drop Box

We prefer that you hand us your documents or upload them to our portal. Life happens however, and we want to make it easier for our clients. We do have a drop box located in our front door. Please notify us of any after-hours drops with an e-mail to: marie@jillleopoldlaw.com. As a reminder our office is located at 214 S. Belmore Street, Leipsic Ohio, 45856.

Need an Extension?

Calculating Estimated Payments: Please visit the IRS web page: <http://www.irs.gov/business/small-businesses-self-employed/estimated-taxes> in order to calculate your estimated tax payments to avoid penalties.

Client Concierge Service

We now offer 2 hours of phone or in-person discussion of questions and help with resolving tax notice issues. \$100- individual or \$200- Business owners. Price includes a 12 month contract.

We look forward to serving you this year.

Very truly yours,

Jill W. Leopold