Roc
Tax and Accounting

3313 Chili Avenue
Suite B
Rochester, NY 14624
(585) 571-4545

January 3, 2026

Dear Friends,

Happy New Year to all! I hope this letter finds you well! Tax time is upon us!

Enclosed you will find a tax appointment checklist, and client information sheet to help get your 2025 tax returns organized. There are multiple ways for you to deliver your documents.

1. You can drop all your documents at the office.
2. You can mail all of your tax documents by Priority Mail to 3313 Chili Avenue Suite B Rochester, NY 14624. I will e-mail you once I receive the documents.
3. You can use our secure portal system - Share File. If you would like to use this option, please send an email to Deb@roctaxandaccounting.com. I can reactivate your account or set a new one up for you. If you need help, please call 585-571-4545.

Due to ever increasing operating costs and inflation the cost of your tax return is going to be increased this year. Please keep in mind, my fees have not increased since 2020. The fee for the tax return must be paid prior to the return being filed.

Please follow the TY 2025 Tax Appointment Checklist. I **MUST** have the information on the checklist:

* I need your Client Information Sheet.
* I need an updated copy of a voided check for my records.
* Include a photocopy of your driver's license (Front & Back) with your tax information as it is a mandatory requirement for filing your tax return. If you file jointly, we will need both spouses' licenses.
* If you have cryptocurrency, foreign bank accounts, or own part of a business outside the USA you **MUST** let us know, you will need to include an 8949 for all of the digital transactions.
* **Do not email any personal private identifiable information such as social security numbers and bank account numbers that could be used to compromise your identity.**

When your tax return is completed, you will be contacted to make arrangements for you to sign your tax return(s). You will be able to come into the office to pick up your return, have them mailed to you, or sent to you via ShareFile and signed by you electronically.

In order to insure that we meet the individual filing deadline, we must receive all of your information by March 15th, 2026. If you are not able to provide us with all of your tax information by March 31st, 2026 we will be able to assist you in preparing an extension request. If you would like for me to file an extension and I receive the information after April 1st, 2026, there will be an additional fee of $95.00 to file the extension, (prior to April 1st, 2026, there is no fee). If we mail your completed tax return and tax documents to you, we will charge a priority mail fee of $15.00 so that we can track the package.

Kindest regards,

Deborah D. Tregea, EA