

Welcome to 2025, I look forward to hearing from all of you soon. - Pete

## APPOINTMENT SCHEDULING

Make your appointments through my website at [pngaccounting.com](http://pngaccounting.com), or call or email to set up a time.

- **In Person Interviews:** Bring your documents to my office.
- **Virtual Meetings:** are recommended. I will be conducting interviews using ZOOM.
- **Telephone Meetings:** If you're not tech savvy and don't want to use ZOOM, we can do a phone call.
- **No Meetings:** Send me your documents and we can complete the process through e-mail or over the phone.

## GETTING YOUR DOCUMENTS TO ME

- **Electronically:** Use the feature on my website to upload your documents securely.
  - Email a request for your username and temporary password.
  - Or you can use the guest portal.
- You can still send thru email, snail mail, or drop off at my office between 9-5 M-F
- **DO NOT TEXT PICTURES TO MY CELL PHONE.**

## ELECTRIC VEHICLE CREDIT

If you purchased an eligible electric or hybrid vehicle you may qualify for a Federal Tax Credit up to \$7,500. You should receive a Form 15400 from the auto dealership to report your purchase. You will need that form to claim the credit.

## ENERGY EFFICIENT HOME IMPROVEMENTS

There are tax credits available for qualified energy efficient home improvements. These are some of the items that may be eligible: Solar Panes, HVAC, Insulation, Exterior Doors and Windows, etc. Please bring the contract or invoice with you.

## HEALTH CARE INSURANCE

- If you had health care you should receive a Form 1095. Please submit with your tax documents.
- If you did not have health care, California still has a penalty.

## VIRTUAL CURRENCIES REPORTING REQUIRED

I will need any information if you sold or spent any virtual currency such as BitCoin

## IMPORTANT DATES

**Jan 31:** W-2's and 1099's must be issued and filed

**Mar 15:** S-Corporation, Partnership, LLC Tax Deadline

**Apr 15:** Individual Tax Deadline and C-Corporation Tax Deadline

## TAX ORGANIZER

A tax organizer provides you with your information from the previous year which can assist you in putting together this year's information. Let me know if you would like for me to send one to you.

## PAYMENTS

I accept cash, check, PayPal, Zelle and all major credit/debit cards. New policy: I will not e-file any returns until payment for my services has been received.

## CONTACTING ME

The fastest ways to receive a response is to contact me by:

1. Email
2. Call my office
3. Text
4. Call my cell phone



An Enrolled Agent is the most comprehensive tax license issued by the IRS.

**"PROSPER AND GROW WITH AN ENROLLED AGENT YOU KNOW"**