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Dear client,

We hope this letter finds you well as we approach the 2024 tax season. As always, our priority is to ensure you are well-prepared for the filing process and aware of any updates or changes that could impact your tax situation this year. We would like to thank you for choosing Armstrong, Ditz & Associates CPA's to file your 2024 tax returns.

As with previous years, you are welcome to drop off all your information, in a securely sealed envelope, in our **LOCKED drop box** or you may stop in and leave your information at the front desk. If you feel your tax situation has significantly changed from last year, please feel free to give us a call and we will determine if it is appropriate to schedule an appointment to discuss. Please be assured that once we begin working on your tax return, you will hear from us so we can ask any questions we may have and go over the tax results with you.

Key Information for 2024 Tax Filing

- **Filing Deadline:** The deadline to file your 2024 taxes is **April 15, 2025**. If you need more time to gather your documents, we can help you file an extension, but please let us know before the deadline.
- **Tax Updates for 2024:** While the standard deduction and tax brackets have been adjusted slightly for inflation in 2024, most people will still benefit from similar tax structures as in prior years. However, if you've experienced any major changes—such as a new job, marriage, or purchasing a home—it's a good idea to review how these might affect your filing.
- **Tax Credits & Deductions:** There are still important credits and deductions available, including the **Child Tax Credit** and credits for **retirement contributions**. If you qualify for these, they can have a significant impact on your refund or the amount of taxes owed. Please let us know if anything has changed in your situation, so we can ensure you're maximizing your eligible credits.
- **Health Savings Accounts & Retirement Contributions:** If you contributed to an **HSA** or retirement account in 2024, these contributions could help lower your taxable income. Be sure to gather any forms, such as 1099-R's or 5498's, if applicable.

What to Gather for Your 2024 Tax Filing

To ensure we can file your taxes accurately and promptly, please collect the following documents:

- **Blue questionnaire sheet (enclosed):** Please complete and include this with your tax information. The form is also available on our website at www.armstrongaccountant.com.
- **Driver's License:** We are **required** to have a copy of **BOTH**, taxpayer and spouse, driver's license or state issued ID's, as well as any *dependents* that file their *own* tax return. If you are unable to make a copy, please bring it with you when you drop off and we will be happy to make a copy for you.
- **New Dependents:** If you have any **new dependents or any dependents have changed** during 2024, please provide a copy of their **social security card and date of birth**. If you have supplied these items in a previous year, please disregard.
- **Income Statements:** W-2s, 1099s, and other income-related documents.
- **Proof of Expenses:** Receipts for deductible expenses, such as mortgage interest, medical expenses, and charitable donations.
- **Retirement Account Contributions:** Forms showing your contributions to IRAs, 401(k)s, or other retirement accounts.
- **Any Other Relevant Forms:** For example, 1098-T (for education-related expenses) or 1099-K (1099-K reports payments and transactions from online platforms, apps or payment card processors. If you have received at least \$5,000 from any of these sources a Form 1099-K will be issued to you).

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When your return is complete, we will call you to let you know that it is ready and when you can pick-up. We ask that when you arrive to please have a check made payable to Armstrong, Ditz & Associates CPAs. We will disclose the cost to prepare the return when we call to let you know the tax return is ready.

Also, a reminder to those that have **W2's or 1099's to issue**. These forms are due to be filed to the IRS and delivered to employees, and contractors by January 31, 2025. To prepare these forms in a timely manner we need the appropriate information at the beginning of January.

Let's Get Started

As always, our goal is to make the tax filing process as simple and stress-free as possible. If you have any questions or need help organizing your documents, don't hesitate to reach out. We are here to assist you every step of the way.

If you have questions or concerns about anything, please give us a call at **(419) 281-1040**. We look forward to working with you again this year and we thank you for your continued trust in our services.

Warm regards,

Nathan Ditz and staff