
Happy 2025 !!

Important Tasks for the Upcoming Tax Season

Data Submission Deadline	March 1, 2025
Tax Deadline for Individuals	April 15, 2025
Tax Deadline for Individuals Filing an Extension	October 15, 2025

Deadlines and Extensions

It is our endeavor to complete tax returns in a timely manner; giving thorough review to each client's unique situation. We prepare and process data in the order it is received and cannot always guarantee that your return will be completed by the deadline on April 15th.

We strongly recommend uploading or dropping off your documents as soon as possible. When you have the majority of your documents ready, please upload or drop them off to us. You can always submit the last one or two items as soon as you receive them. This helps us to be the most efficient with our time during the busiest time of the year, which is a benefit to you!

If we do not receive any tax data from you by March 1, 2025 an extension will need to be filed. Extensions are necessary for many individuals and a common practice for both taxpayers and practitioners. Please refer to the specific information we shared with you this fall about filing an extension.

[MORE INFORMATION ABOUT EXTENSIONS](#)

Data Submission

We have prepared a checklist that can be used as a guide for compiling your tax documents for submission. We will accept your tax documents via our secure client portal through Sharefile or by your hand delivering them to our office. An appointment is not necessary for tax document drop off.

Our professional credentials will not allow us to accept sensitive information in an unsecured manner. Please **DO NOT SEND** any social security numbers, W-2s, banking information, usernames or passwords via text or email. If we receive information from you in this manner, we will immediately delete it and request that you send it through our secure client portal.

Our secure client portal through Sharefile can be used to upload your data. If you need help in accessing your account, you can request a password reset by clicking "forgot password." As a client user, you can also enable two-step verification to your login for added security. This can be found in Settings > Personal Security.

TAX CHECKLIST FOR INDIVIDUALS 2024

CLIENT PORTAL

General Reminders

Tax Payments

If you owe taxes, we can draft funds from the bank account you specify. Please make sure we have the correct bank routing and account numbers. It is your responsibility, as the taxpayer, to make sure that any tax payments drafted from your bank account have processed. The Dages Group does not receive any correspondence from the IRS or state agencies related to the success or failure of electronic payments. Check your bank activity to verify payments have been drafted to avoid any penalty and/or interest for late payments.

Client Communication

We work as a team here and every return is checked by someone other than the preparer so you may receive questions from Kim, Rose, Karen Griffin, Karen Rosser, or Pam.

It is greatly appreciated if you provide answers to our questions in a single communication. We will send our questions in a word or excel document so that you can update as you find the answers, but please submit to us only when all questions have been answered.

We appreciate your patience as we work to prepare the bulk of our returns from January 15th to April 15th. During this time, we are focused on completing returns and may not be able to respond as quickly to messages, but we will do our best to reply in a timely manner.

Updates to our Billing Policy

Payment is expected upon completion of filing your return.

Upon receipt of payment for tax preparation services, an electronic copy of your return will be uploaded to your Client Portal.

From this portal, you can download a copy of your return.

****We will no longer provide paper copies of tax returns.****

Your prompt payment is appreciated!

Interest will be charged on any invoices outstanding beyond 15 days.

Should you have any questions or need further explanation, please reach out to us.
We look forward to working together!

Kim, Rose, Karen, Karen, Pam and Bobbie Sue



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