

Happy New Year & Welcome Back

As we approach a new tax season, consider submitting your documents early and online. Remember you can file your tax return remotely using the Client Portal or in-person at our office. To schedule an in-person appointment, call the office and we'll be happy to assist you.

Lorie will be in town until end of April this year, so if you would like an in-person appointment, please keep that in mind.

WHAT'S NEW THIS YEAR

Document Submission Deadline: In order to file your tax return in a timely manner, we ask that you submit all documents no later than the dates below. If you need to file an extension, you **MUST** contact the office directly.

- Corporate Reports - **February 15th, 2025** (Partnerships, LLCs and S-Corps)
- Personal Tax Documents & C-Corps - **March 15th, 2025**

IRS PIN # is required if you had one given to you or you have had any fraud issues in the past.

Insurance Form 1095A is required if you had health insurance through Covered California at any time during the year 2024.

Client Portal: When providing your documents via the [Client Portal](#), be sure to name each file and confirm files open correctly and are not encrypted when uploading. (Accepted Format: PDF). Due to increased spam emails, our office will **NOT** accept documents via email or text messages. If you've uploaded your documents successfully, you will receive a confirmation email within 48 hrs that we have received your file. Once we have reviewed your documents, if we notice additional information is needed, we will follow-up via email, we urge you to keep an eye on your inbox. Complete submissions are worked on in the order they are received. Click here for a step by step [guide for using the Client Portal](#), or visit our website www.quiktaxservices.com for more information.

Remote Tax Return Finalizations: When your tax return is ready, we will call you to schedule a telephone finalization appointment. Upon completion we will have you sign documents electronically, and once you sign, you will need to download your copy immediately for your records.

Fraud Alert: IRS will never call you directly, but they will send you a notice via US Mail. If you receive such a notice and require assistance, upload all pages of your notice to the Client Portal. We'll review it and contact you via email if needed.

Mailing or Dropping Off Tax Documents: Before submitting your documents, confirm you have collected all necessary paperwork for the correct filing year. When providing us with your documents, please send **copies only** and keep your original documents for your records.

Please note, **All** tax documents must be sorted, please make sure to open and remove all envelopes, and include **ONLY** documents pertaining to your tax filing year.

If you are dropping off, place all your documents in a sealed envelope with your name on it and drop it directly through our office mail slot.

Estimated IRS Payments:

Did you make payments to IRS? We will need to know exactly how much you paid and when it was paid.

Did Something Change?:

If your information has changed (retirement, births, deaths, official name change, property refinance, purchase or sales, stocks or related other questions), please upload documents to our Client Portal. We'll review your changes and follow-up with you if needed.

Filing Your Return on Time:

Finishing your submission in a timely manner is our number one priority. Only complete submissions are prepared in the order that they are received. Upon review, we will request any missing information via email. Not receiving requested information in a timely manner could cause your return to be delayed.

Phone: 714-744-4077
Fax 714-744-2568
Email: info@quiktaxservices.com
Contact Request: [Quiktax Service Inc](#)

Our Policy:

Cancellation of telephone or office appointments with less than 24 hrs notice will be charged \$75.00. Rush fee (within 72 hours of due date) will be charged \$250.

Payments of Service:

Payment for tax return is due at time of finalization. Tax returns will not be filed with IRS unless payment is received. We accept cash, checks, Venmo & major credit cards (4% convenience fee). Checks need to be dropped off or sent certified as our mail service tends to be unreliable.

Referrals:

Thank you for continuing to help our business grow! We welcome all referrals. Please share a positive experience with your friends and family. Click the [link to our YELP page](#) or picture below to leave a review.

We look forward to hearing from you soon!

~Lorie & The Quiktax Team

