

January 30, 2026

RE: 2025 PERSONAL TAX ORGANIZER

It's that time again. Attached please find your personal tax organizer for the 2025 tax year. Please complete this form and return it to our office by March 6th to ensure timely filing. Be sure to carefully read and complete all the sections that apply to you and then sign and date the form before returning it to us. Also included is an Engagement Letter we'll need to have signed, dated and returned prior to preparation. You can mail or email the forms along with the requested supporting tax documents with it. If emailing, DO NOT "REPLY ALL" to this email. If mailing, be sure to mark it "**Attn: Tax Dept.**". If you are more comfortable dropping your information off, we have a mail slot in the front vestibule of our office. Our office is open Monday - Friday from 8:30 - 4:30 for drop offs.

NEW FOR 2025

Non-taxable tips. Please review the income section regarding non-taxable tips. There was no reporting requirement for the employer for 2025. If you had tips that were included in your taxable wages you will need to determine the amount and be able to substantiate it if questioned by the IRS.

Non-taxable overtime. Some overtime could be non-taxable. There were no reporting requirements for employers for this in 2025 either. You may have it broken down on your paystubs. In that case we will need to get your final paystub for 2025. If you received any double time we would need to have that amount listed separately.

New vehicle interest. If you purchased a new vehicle in 2025 and it is used Personally, you may be able to deduct the interest on the loan. Please see the section at the top of page three, if this applies to you.

Please be sure to review the question regarding foreign bank accounts and trusts under INCOME in the middle of page two. There are substantial penalties if foreign accounts aren't disclosed.

If you made non-cash contributions in excess of \$500.00, please include a copy of the receipt, along with a description of the goods donated and the estimated "thrift store" value. We can't claim a deduction if a description and estimated value is not on the form.

Please call us if you have problems filling this out. It is important that this form be completed and signed for us to complete your personal taxes. If you prefer an appointment to discuss this with us in person, please call our office at the number below to set up an appointment in advance.

This organizer is available for download at our website: www.compacctg.com under Forms & Tools. You can also access IRS and Michigan tax forms as well as track the status of your refund from our website.

Sincerely,



John S. French, Accountant

Attachment