

829 S Green Bay Rd Suite 108 Mount Pleasant, WI 53406 262-633-4590

Happy New Year to our clients!

With the new tax season upon us, we would like to inform our clients of what is new or expected for 2024 returns and current tax year.

Other Notable Increases

## 2024

Standard Deduction Increases			Mileage Rate	\$0.67	\$0.70
Filing Status	2023	2024	<b>HSA Contributions</b>	4,150 / 8,300	4,300 / 8,550
Single / Married Filing Separately Head of Household Married Filing Jointly (Qualified Widow)	20,800	14,600 21,900 29,200	IRA Contributions	7,000 8,000 <i>50</i> +	7,000 8,000 <i>50</i> +
	ŕ	,	401 Contributions	23,000 30,500 <i>5</i> 0+	23,500 31,000 <i>50</i> + 34,750 <i>60-63</i>

## **Tax Prep Options**

**Drop Off** 

Stop in during office hours.

Please plan to spend a few minutes updating your information and signing our engagement letter.



Use the secure drop box located outside our office entrance.

Please include your name & number. Someone from the office will reach out to ensure your information is up-todate and to arrange for you to sign our engagement letter.



Upload your tax documents to our secure file share account.

2025

If this is new to you, please contact our office to request access.

After receiving your uploads we will contact you to verify your current information and arrange for our engagement letter to be signed.



Clients are always welcome to make an appointment to meet with Ryan.

If this is your preference, we encourage you to call as soon as possible. These openings fill up quickly.

As with every season, we try our best to accomplish a quick turn-around time. To best avoid any delay, we ask clients to review their tax documents to ensure that you have gathered all information we may need.

For your convenience, we have included a checklist on the reverse side of this letter. We encourage you to use this, in addition to reviewing your tax documents from last year.

We need to receive your tax documents <u>no later than March 15<sup>th</sup></u> to guarantee filing by by the April 15<sup>th</sup> deadline for all returning clients

If you know you
will need an
extension, please
let us know!

Tax Season Office Hours Monday January 27th through Tuesday April 15<sup>th</sup>

Mon – Thur 9am – 7pm | Fri 9am – 5pm | Sat 10am – 3pm