

Tax Year 2024 Information

2024 Tax Year Client Organizer – Review all pages of organizer and update information as applicable. Verify accuracy of cell phone number(s) and email address(es) on **page 1**. Please review and answer questions on **page 4**.

Add notes on the last page of the organizer, or include a separate note, to indicate **significant life changes** that may have occurred during the year (marriage, divorce, having a child, moving, etc.) – when in doubt, please make a note and we will reach out with follow-up questions.

IMPORTANT DATES!

Submit your tax documents as early in the tax season as possible. Most tax returns, where **complete information** has been submitted to our office by **March 15th**, will be completed by the **April 15th** due date. Tax packets received near (and after) **March 15th** may need to be extended. If you are waiting on a “late” document, and the March 15th deadline is approaching, submit your documents with a note letting us know you are waiting for additional information.

Choose any option below to submit your tax information

- Mail to our office using the enclosed envelope.
- Drop off in-person (check our website for office hours) or deposit into our secure drop box located just outside our office door.
No need to verify your documents have been received.
- Scan and upload your tax documents to our secure client portal, SmartVault, at <https://hurstkelly.smartvault.com>.
Once completed, email info@hurstkelly.com to verify receipt. *First time users, please email Jennifer Langdon at jenniferlangdon@hurstkelly.com for assistance.*

Please Provide the Following

Invalid and/or expired driver’s license/state ID information will cause processing delays and may even result in your returns being rejected.

	Taxpayer	Spouse (If any)	Direct Deposit Info
License/ID - Full Name	_____	_____	Bank _____
License/ID - Issuing State	_____	_____	
License/ID - Number	_____	_____	Routing _____
License/ID - Issue Date	_____	_____	
License/ID - Expiration Date	_____	_____	Account _____

Extending your Tax Return

Go to Current Client Documents on our website at www.hurstkelly.com or email info@hurstkelly.com for assistance.

- Individual Tax Return – Form 1040: Contact us by: **April 8th, 2025**
- Business tax returns (Forms 1065 and 1120S) for Dec. 31, 2024, year-ends: Contact us by: **March 10th, 2025**

2024 HSA Account - Include Form 1099-SA. If you have not received your form, log into your account and print.

2024 College or University Tuition and Expenses - Include Form 1098-T. Generally, Form 1098-T is not mailed. Log into your account and print. List other educational expenses separately with a summary of the total amount paid.