FOOTHILLS CPAs LLC
150 Executive Center Drive
Suite 223, Greenville, South Carolina 29615.

2024 TAX ORGANIZER

Please review the engagement letter at the end of this organizer. After you finish, initial below to confirm you have read and accept the terms of our engagement.
Client initials: ______ Client Initials: ______

The filing deadline for your income tax return is **March 17, 2025 (S Corps and Partnerships) and April 15, 2025 (C Corporations)**. Your completed tax organizer needs to be received no later than **February 14, 2025 (S Corps and Partnerships) and March 15, 2025 (C Corporations)**.

If an extension of time is required, any tax due must be paid with that extension. Any taxes not paid by the filing deadline may be subject to late-payment penalties and interest.

The Internal Revenue Service (IRS) matches information returns/forms with amounts reported on tax returns. A negligence penalty may be assessed when income is underreported or when deductions are overstated. Accordingly, all information returns reflecting amounts reported to the IRS are also mailed or delivered to taxpayers in an envelope clearly marked "**IMPORTANT TAX DOCUMENTS ENCLOSED**" and should be submitted with this organizer.

BUSINESS INFORMATION		
Business Legal Name:		
Trade Name:		
Date Business Began:	State Incorporated:	
EIN:	Phone:	Email:
Current address:		
City:	State:	ZIP Code:

DOCUMENTS TO UPLOAD	
Please mark each as applicable and upload corresponding documents within your file:	
☐	**Financial Statements: (If Foothills doesn't have access to your QBO):** Please upload a Balance Sheet and Income Statement (P&L) **as of 12/31/2024** • Please also include a detail report of fixed assets acquired or disposed during 2024.
☐	**Payroll (If Foothills doesn't have access to your Payroll account):** Payroll detail report as of the final pay period of 2024. The report should include: • Cumulative wages, benefits, and employer and employee taxes paid detailed for each employee

ESTIMATED PAYMENTS					
Did you make any estimated Payments for the 2024 tax year? If yes, please detail the authority and date of payment.					
Federal	**Date**	**Amount**	**State**	**Date**	**Amount**

BUSINESS INFORMATION		
Please answer the following questions and submit details for any answered "Yes."	Yes	No
Were any owners or partners added to the business during 2024? If there were changes in ownership, please include the following for any new owners (name, address, tax id). Also detail changes to shares or ownership percentages or provide revised Equity Capitalization table.	☐	☐
Name / Tax ID:		
Address:		
City: / State: / Zip:		
Did the business enter into loans, notes, or other financing (besides credit card) during 2024? If so, please provide: • the approximate dollar amount and loan term here • loan term sheets or other applicable supporting documents with your uploads.	☐	☐
Does the company have sales, perform work in, have employee work locations, or otherwise have a business presence in states other than its home state? If so, please provide the name of the other states and detail approximate Sales, Rent Expenses and employee wages applicable to each state below.	☐	☐

	STATE		
List Each State:			
Sales			
Rent			
Payroll			

Does the company pay for employees' health insurance? If so, please detail the percentage paid.	▯	▯
Does the business pay for officer health insurance? If so, please include the total amount for each officer (If not broken out separately in your books or profit and loss statement)	▯	▯
What accounting software did the company use for its books this year?		

Do you expect any significant changes to business income or expenses?
Please detail any amounts as helpful:

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January 2025

Dear Clients:

Happy New Year! We hope this letter finds you well and that you enjoyed a wonderful holiday season. This letter serves to orient new clients to our tax season process and to provide updates for our returning clients. Please keep a copy of this letter to reference as you gather your documents for tax filing. It will help make sure this year's tax season progresses smoothly for everyone.

Contacting Us & Meeting Availability

Our central point of contact for tax season will be the Foothills Admin address (**admin@foothillscpas.com**). **All questions regarding meetings, tax document submission, fees, return status, and invoice payment should be sent to this address. Even if you typically contact Rajani or other team members directly outside of tax season, please use the admin e-mail address during tax season as it will help us ensure timely communication with you.**

All meetings will continue to be held virtually. You can view meeting availability and schedule a meeting online at **https://calendly.com/foothillscpas**. We have found that the most productive tax season meetings are those where we've substantially completed your return prior to the meeting and are able to review the return with you through a web conference. These meetings help to make sure we've prepared the return correctly and are not missing any opportunities for deductions as well as provide you with a better understanding of the return and any tax planning steps that can be implemented for the current or subsequent year. Accordingly, we encourage clients who would like to schedule review meetings to schedule at minimum two weeks out from when you anticipate providing your documents to us.

Dates & Document Submission

Individual returns:
Document submission deadline: March 15, 2025
Tax filing deadline: April 15, 2025

Business returns (Partnerships and S Corporations):
Document submission deadline: February 14, 2025
Tax filing deadline: March 17, 2025

Trust and C Corporations:
Document submission deadline: March 15, 2025
Tax filing deadline: April 15, 2025

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Please be sure to submit your documents to us by the noted document submission deadline. If documents are received after the deadline, we will file the appropriate extensions and communicate next steps as we will not be able to guarantee that your returns will be submitted by the tax filing deadline. Our document submission deadlines help to ensure adequate processing time to complete, review, and submit returns in time to meet the tax filing deadlines.

You can begin uploading documents to your portal as soon as you're ready; however, we ask that you hold off on notifying us that you have submitted documents until you have uploaded **all** documents including **a completed tax organizer**. This will help us work more efficiently on your return.

We strongly encourage usage of your **electronic portal** over email or traditional mail for questions, document submission, return delivery, and communication about your return. The portal helps us keep your information secure and organized by maintaining one central place for communication. Box has message technology that allows you to communicate directly with Admin, your client steward, or any other team members. The comment features work by typing '@' and then the name of the person you want to contact within any file included in your Box portal.

Document Submission Options

Electronically:
Box: https://foothillscpas.app.box.com/ Returning and new clients should have access to Box already. If you don't have an invitation/account, please contact us by phone or email to admin@foothillscpas.com. Box is an industry leader in secure online file exchange and storage. It uses a simple folder-like structure to store and transfer documents. Once you have finished uploading your documents, please be sure to send us an email or use the comment feature within Box to send a note to Foothills Admin.

Postal Service/ FedEX / UPS: We encourage you to obtain a tracking number when you send copies of your documents by mail or delivery service to our Greenville, SC office.

A copy of your completed return will be sent electronically through the Box portal. We will only mail copies upon request.

Please note we will not be holing and returning original documents. If you decide to mail us your documents, please be sure that they are copies.

1099 and W-2 Reporting

We will be offering 1099-MISC or W-2 form filing services for our clients. This offering begins at $100 for up to 5 forms to be filed. Additional forms may be added in at the rate of $50 per 5 forms. W-9 forms, W-4 forms and other application information for 1099 and W-2 form filings should be provided by the close of business Friday, January 24th in order to allow adequate time to prepare and file your forms in time for deadline Friday, January 31st. Please contact us at admin@foothillscpas.com to request 1099 or W-2 filing.

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Worksheets & Tools

We offer several helpful worksheets related to various income, expenditures, and deductions. These worksheets can be found our website within the Business Resources and Individual and Family Resources sections of our Forms page.

Fees, Services & Payments

We will be increasing our standard fee structure by approximately 5% of this year. For new clients or those that have already completed proposal and engagement letters specifically for the 2024 tax year, you will not see any change to your agreed upon fee. All other clients can expect a 5% increase in their engagement fee from last year.

We will be collecting tax preparation fees up-front at the time of document submission. Upon receipt of your documents, we will follow-up with an invoice of your estimated fee (based on the prior year's return). As we complete your return, we will submit a final invoice, if necessary, based on your 2024 return. Payments can be remitted electronically through links included with each invoice. Please contact us with any fee related concerns.

Your fee includes return preparation, meeting time (if necessary) and a limited amount of email and phone correspondence throughout the year regarding this particular tax year. If there are significant changes, or other tax or financial issues you would like to review with us either by email, phone, or in a separate meeting, we offer those services at an hourly rate or as a separate agreed upon engagement. We understand that tax and personal situations change throughout the year and we remain available to provide relevant and timely information for you.

In additional to tax planning and return preparation, we offer accounting services: bookkeeping, accounting system consultation and training, and budgeting. We also offer new business consultations, outsourced CFO services and other advice to small and medium-sized businesses. We encourage anyone interested in these services to contact us for further information.

In closing, we look forward to working with you this tax season and appreciate your choosing our firm for your tax preparation needs! As always, please do not hesitate to let us know should you have any questions or concerns along the way.

Cordially,

Rajani

Rajani Pudipeddi, CPA
Managing Member