



*Sartell Tax & Accounting
Services, Inc.*

Making taxes less puzzling!
320 - 656 - 9021

Hello everyone, 2024 is almost over and tax season is arriving once again. We are looking forward to another year of helping you with our area of expertise. This is what we love to do and look forward to making your taxes less puzzling. Diane and Christie have had a busy year with education, new legislation, updating processes, and utilizing software. As usual we ask that you please read the full letter and fill out all attached paperwork.

We are not changing much from last year.

- **Prices are the same** as last year unless you have a change in what you need filed.
- Once your return is complete we will be emailing your invoice through TaxDome. You can either pay online or pay when you come in. All card payments will receive a 3% service fee. Please make sure we have a good email address on file.
- TaxDome – is an option NOT A REQUIREMENT.

Our Hours Office hours will be **Mon, Wed-Fri 9am-6pm & Sat 10am-3pm**, or by special arrangement. Regular hours and appointments will start February 3rd 2025. **We don't have a receptionist on Tuesday so the doors will be locked.** We are still working and may make phone calls but we are not open for in person communication.

Must do **BEFORE** coming in for an appointment or **BEFORE** dropping off paperwork:

1. Remove all paperwork from original envelopes. (A **\$30** surcharge will be added if we open your mail)
2. VERIFY YOUR ADDRESS, EMAIL, AND BANKING INFORMATION – on attached paperwork
3. Answer all questions in the questionnaire **4 pages**. (If you need help please ask. We will make you fill it out before processing your return.)
4. Make sure your engagement letter is signed. (We cannot begin processing without this done.)
5. Please take the paperwork out of envelopes, place in a neat pile with no staples or paperclips. (The first thing we do is scan all paperwork brought in even for appointments.)
6. Please do not send me your medical receipts or other receipts, give us a total in the organizer. (Extra receipts will be charged accordingly.)
7. Include ALL pages of investment statements.
8. Do not staple or tape your documents. (We scan everything.)

Other season reminders and notes

1. Property tax refunds will be processed after May 1st and done by mid August. You will not see an estimate in your tax return. (We will send your copy once done by mid August.)
2. As a reminder, your return will not be ready for pickup until we call you. (All returns will get a call or text maybe used.)
3. The receptionist does not have tax knowledge. If you have questions you need to call and talk to Diane/Christie or write your questions down. Someone will call you when we are working on your return to answer your questions & go through your tax return results.
4. Renters – **New** this year! CRPs are needed to file with your Minnesota Tax Return to receive your rent refund. (Rent refund will be included with your MN refund.) *CRP must have an electronic filing number on it.

REMINDER: We are requiring you to fill out the attached information and provide all tax documents. If we are missing your filled out questionnaire or signed engagement letter, this will extremely delay our processing of your return and you will incur an additional charge. Our website www.sartelltaxservice.com has more information.

SEE BACKSIDE FOR MORE INFO



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DROP OFF

Paperwork must be received by **March 31st** to receive a \$20 drop off discount, no discount after March 31st. You will not sit down with an accountant with this option. You will receive a phone call when your return is being processed or finished.

- Drop off options: **(1)** In the slot in the window that drops into the building **(2)** Tax Dome upload **(3)** Mail to PO Box 283; Sartell, MN 56377 **(4)** Fax to 320-252-2430 **(5)** Hand to the front desk. (If there is a line utilize option 1 above. Priority is not given to drop offs.)
- Dropping off early or calling us will not get your return done faster.
- Complete and organized paperwork will help your return get done faster.
- Please pick it up within 7 days of completion or you will not receive the drop off discount. (Not applicable if you communicate having a conflict, vacation, etc.)
- Expedited services are offered for in office drop off or client portal upload. When you upload/drop off, please indicate that you would like it expedited. There will be a \$50 charge added to your return.
- If you drive from a distance of 45 miles or more, but don't need to sit with a preparer, give us a call. We have some options that could save you the appointment fee and get your return done in one trip.

APPOINTMENT

If you have an appointment scheduled as of Dec 3rd 2024, the date and time are printed in the attached organizer. If you think you scheduled prior, and don't see a date and time, you **DO NOT HAVE AN APPOINTMENT ON OUR CALENDAR.**

- In Office Appointment* - Due to high call volume please schedule online or call and leave a voicemail. There will be a \$50 appointment fee added to your return.
- Zoom Meeting* – Upload info to Tax Dome or drop off ahead of time. When you upload/drop off, please indicate that you would like a zoom appointment. We will then call you to schedule the zoom. Do not schedule ahead of time. There will be a \$50 appointment fee added to your return.
- If you drive from a distance of 45 miles or more, but don't need to sit with a preparer, give us a call. We have some options that could save you the appointment fee and get your return done in one trip.

**Exceptions may apply, subject to client needs*

- ***NEW*** We will have a FAQ sheet available at the front desk or online this year to inform you of the many changes that are coming in 2025 and possibly 2026.

Also, if you have any questions, please feel free to contact us at: **320-656-9021**, email info@sartelltaxservice.com or message us in the TaxDome portal. We look forward to serving you.

Sincerely,

Diane St. Sauver

Diane St. Sauver
Certified Public Accountant

Christie L. Szabla

Christie L. Szabla
Certified Public Accountant