

December 10, 2025

Dear All,

As the year winds down, the tax reporting forms begin to arrive and we want to remind you which ones we need you to accumulate and send to us with your tax information.

The new One Big Beautiful Tax Bill this year means we will be applying the new deductions for seniors, tips, overtime and car loans, charitable contributions, mortgage interest, mortgage insurance premiums and real estate taxes where we can. If you are a W-2 employee, make sure to provide us with any attachments to your W-2 this year so that we don't miss the tip or overtime deduction!

We still need the annual information forms that are sent to you for tax purposes from banks, credit unions, etc. And we strongly request you complete our organizer. As a reminder, here is a simple checklist:

- W-2 for wages
- W-2G for gambling
- 1099-Int for interest
- 1099-DIV for dividends
- 1099-B Brokerage
- SSA-1099 Social Security
- 1099-NEC for income
- 1099-Misc for income
- 1099-K for income
- 1099-R for retirement
- 1099-G for refunds & unemployment
- 1098-Int for mortgages
- 1098-T for tuition
- 1099-SA for HSA's
- K-1 forms from investments in S corporations or partnerships
- Form 5498 for IRA values
- IRA and Roth IRA contributions for 2025
- Child care costs, and the name, address, amount and ID # of the recipient
- Charitable donations-total amounts and recipients - **Noncash Donations must have an amount for the items donated. Request a Donated Good Valuation Guide.**
- Property tax paid on your home, property or cars
- Estimated tax payments and dates
- Any letters you received from the IRS or state tax authorities
- Our engagement letter

If you have a small business or rental property we can provide you with a separate checklist for those activities if needed.

Again, crypto-currency activity continues to increase, and we need to report any crypto activity, please be sure to provide us with that information. **We must have the Detailed purchases and sales information or the 1099 or the 8949 Forms provided by the Crypto Company that is required by the IRS.**

New credits for home energy efficiency improvements end this year and can provide you with tremendous tax benefits. If you installed a new furnace, A/C, boiler, heat pump, water heater, woodstove, windows, doors, insulation, solar or battery storage please be sure to provide us with a copy of the invoice.

Aimee O'Neill & Co., Inc.

REAL ESTATE BROKER • AUCTIONEER • APPRAISER • MANAGEMENT & ACCOUNTING SERVICES

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"Serve the Lord with Gladness" Psalm 100:2a

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Increasing complexities in the preparation of even the simplest income tax reporting returns require increased time to collect information and prepare returns.

<u>FORM/SCHEDULE</u>	<u>ESTIMATED/MINIMUM FEE</u>
1040 & 1 state with One (1) W-2	\$ 300.00
1040 & PA with One (1) W-2	\$ 350.00
1040 & MD with multiple W-2's/1099-R's	\$ 350.00
1040 & PA with multiple W-2's/1099-R's	\$ 400.00
1040 & 1 other states with multiple W-2's/1099-R's	\$ 400.00
1040 & MD with Schedule A & B	\$ 450.00
1040 & 1 other state with Schedule A & B	\$ 475.00
1040 with Schedule C & 1 other state	\$ 600.00
1040 with Schedule F & 1 other state	\$ 600.00
1040 with Schedule E with 1 rental property & 1 state	\$ 600.00
Business Returns fee in addition to personal return fee:	
1065	\$ 1,250.00
1120/1120S	\$ 1,250.00
1041	\$ 1,250.00
Bookkeeping Consultation Training Services	\$ 150.00 per hour
Bookkeeping Data Entry Services	\$ 75.00 per hour
Payroll Services	\$ 75.00 per hour
Consultation Services – Aimee O’Neill	\$ 300.00 per hour
Accounting * Real Estate Valuation & Management	
Tax & Estate Planning * Elder Care	

These fees are minimum fees subject to increase based on the number of forms, bookkeeping services required, and complexity of the tax return.

Free initial consultation is offered and a proposal for the Tax Preparation Fee will be developed after reviewing your information.

Aimee and the Ladies at O'Neills value each of our clients and the relationships that we have built throughout these many years. We appreciate your patience and kindness. We will continue to answer your questions and provide accurate and caring income tax preparation services.