



JANUARY 2026

TAX TIPS & MORE

- * Drop offs will be accepted in our SECURE 24 hour drop slot at the front door as well as at the front desk and via REVVER. PLEASE DO NOT SEND CONFIDENTIAL DOCUMENTS VIA EMAIL!!!

Drop offs after March 31st will be subject to an extension .

OPERATION WE CARE

Please carefully consider making a monetary donation to **Operation We Care** when visiting our office this tax season. ITL will be matching every donation dollar for dollar up to \$1,000! **Operation We Care** is an IRS recognized exempt organization whose purpose is to aid and support deployed members of the Armed Forces of the United States of America and their families.

ITL CLIENT NOTIFICATION: Our office will retain the most recent 3 years tax returns as required. Taxpayers should retain 10 years with supporting documentation.

2025 REMINDERS:

- REQUIRED DOCUMENT: Form 1095-A MARKET PLACE HEALTH INSURANCE (if applicable)

2025 CHANGES:

Please see pages 2 & 3

REQUIRED QUESTION:

- At any time during 2025 did the taxpayer or spouse (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?

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Check out our "**Find It**" tool on our website:

www.itlaccounting.com to track your refund status for Federal and State refunds.