Crowley Associates
TAX & ACCOUNTING

January 12, 2026

Dear Valued Client,

We hope you and yours had a relaxing and joyful holiday season. With 2026 upon us, we are already gearing up for tax season and are reaching out with some important information. Please check out our website for up-to-date information: www.crowleyassoc.com.

For 2025 tax returns, the regular tax filing deadline for individuals will be **Wednesday, April 15, 2026**. As always, there are a few dates our firm will adhere to with regards to individual filing:

- January 26, 2026 – the first date we can file tax returns. While you can provide materials sooner (if you have them), we are unable to file before this date.
- March 13, 2026 – deadline for clients to provide all tax materials to guarantee filing by the April deadline.
    - If you provide materials after this date, we will make every effort to file your return by April 15th but we cannot guarantee it.
- April 10, 2026 – deadline to notify us that you would like an extension. We will only be filing extensions for clients whose materials we already have or who notify us they would like us to file an extension on their behalf. Extensions do not cost anything to file for clients who use our firm to file their taxes.
    - For clients who typically owe, please be aware that the IRS and NYS both charge interest for an amount owed that is not paid by the April deadline. If you anticipate owing, it is a good idea to make a payment with your extension. Our tax preparers can advise you about that when you reach out.

We can accept tax materials in person at our office, via fax at 518-384-1358, or via email at tax@michaelcrowleycpa.com. **If dropping off materials, there is no need to call to request a time or appointment** – please drop off at your leisure during our normal business hours. For after-hours drop-offs, we maintain a locked drop box next to the door which is checked daily. When gathering tax materials, please reference the checklist on the next page to ensure you are providing all documents we need to accurately prepare your return. Please also notify us if you have had any changes in your primary address, filing or marital status, or with your dependents. We appreciate your assistance.

We ask that you complete the client information form on the last page and return it with your materials so that we have the correct information to file for you. Our business hours are Monday thru Friday 9:30 AM-4:30 PM, with extended hours on Wednesdays until 6:30 PM. Weekend times are only available by appointment.

If you are interested in learning more about the tax changes resulting from the legislation passed in 2025, please visit the News and Resources portion of our website: https://www.crowleyassoc.com/news-and-resources

Small businesses cannot survive without the continued patronage and support of clients like you. As a veteran-owned, family-run small business, we are proud to serve the Capital Region and beyond while providing the highest quality service. Best wishes for a prosperous 2026 and we look forward to serving you!

Sincerely,

Mike and Staff at Crowley Associates

Crowley Associates Tax & Accounting
104A Heckeler Drive | Glenville, NY 12302 | 518-384-1517
www.crowleyassoc.com

TAX PREPARATION CHECKLIST

✓	Form/Information	✓	Form/Information
	Wage and earning statements from all employers: W-2, 1099-NEC, and/or 1099-MISC		Total paid for daycare provider and the daycare provider's tax identifying number
	Social Security income received – Form SSA-1099		For those with dependents in college – a form 1098-T issued by the college
	Unemployment income reported on Form 1099-G		Form 1098-E for student loan interest
	Miscellaneous income: jury duty, paid family leave, gambling winnings, Medical Savings Account, scholarships, etc.		For those who own one or more rental properties, please provide all information regarding rent received and property expenses for each property, including how many days available for rental
	K-1 for any business for which you are a shareholder, partner, or owner (not related to the trading of stocks)		For those with self-employment income or 1099-NEC income, please include any expenses associated with the course of that business and any health insurance premiums paid
	1099-R for any retirement distributions		Records or amount of IRA contributions for the year
	Interest and Dividend statements from investment accounts (Forms 1099 – DIV, INT, etc.)		Voided check if using a bank account we do not have on file or if new client.
	1095-A health coverage statement (if provided). This is for individuals who maintain health insurance through the marketplace.		Energy efficient home improvement information (i.e. receipts for items such as new energy rated windows or doors, installation of solar panels, installation of new energy-efficient furnace, etc.)
	If you are a volunteer firefighter, please let us know		Any long-term care insurance premiums paid
	Estimated tax payments – please provide records of all estimated tax payments made throughout the year, including amounts paid and dates.		Property and school tax forms from 2025 – please note these will have ‘2025’ at the top and should not be from 2024 OR 2026.
	Car loan interest paid for vehicles purchased in 2025		Supplemental overtime information

This list is not exhaustive but should provide basic information on what our office needs to prepare your tax return the best we can. If you have questions about a specific tax form you received or expense you incurred, please let us know.

TAXPAYER INFORMATION

CLIENT NAME(S) and PHONE NUMBER: ____

EMAIL ADDRESS: ______________________________

OCCUPATION(S): ____

DID YOU SELL OR DISPOSE OF VIRTUAL CURRENCY (I.E. BITCOIN OR CRYPTOCURRENCY) AT ALL DURING 2024? *(circle one)*

YES NO

PLEASE INDICATE HOW YOU WISH TO RECEIVE A COPY OF YOUR TAX RETURN *(check one)*:

_____ EMAILED TO ABOVE EMAIL ADDRESS

_____ PRINTED FOR CLIENT PICKUP

_____ PRINTED AND MAILED TO ABOVE ADDRESS - $8 CHARGE ADDED TO INVOICE

INFORMATION ON FRONT AND BACK OF STATE-ISSUED DRIVER'S LICENSE (NO NEED FOR COPY)

ID #: ________________________

First 3 characters of document # (on back for NY, and/or after IDUSA): __________

Issue Date: ___________ Expiration Date: ___________

SPOUSE STATE-ISSUED DRIVER'S LICENSE INFORMATION *(IF APPLICABLE)*

ID #: ________________________

First 3 characters of document # (on back for NY, and/or after IDUSA): __________

Issue Date: ___________ Expiration Date: ___________

By signing below, I acknowledge that all of the information I have provided to Crowley Associates Tax & Accounting is accurate and complete to the best of my knowledge. I permit Crowley Associates to electronically file my tax return using a Personal Identification Number which will be kept on file. I agree to pay the invoice issued for tax preparation services within 30 days of receipt of invoice or establish an agreed-upon payment plan.

______________________________________ Signature

__________________ Date