

Please READ THIS!

If any of the following relates to your situation, please bring it to our attention:

- If you had a **financial interest in or signature authority over a financial account (bank, securities, or brokerage) located in a foreign country**;
- At any time during the past year did you receive, sell, send, exchange, or otherwise acquire **a financial interest in any virtual currency**?
- If you have incurred **Adoption expenses** within the last 3 years or expect to incur **Adoption Expenses**;
- If you are **Retired public safety officer** (law enforcement officer, firefighter, chaplain, or member of a rescue squad or ambulance crew) **and your government retirement plan distributions are used to pay health insurance premiums**:
- **If you purchased an eligible ‘Clean Vehicle’ before September 30, 2025;**
- If you **Contributed to or took a distribution from a 529 plan** education savings account;
- If you paid or received **Alimony**;
- **If you paid child support for at least ½ the year through a support collection unit for a minor child who does not reside with you;**

- If you **Exercised stock options but did not sell the stock** last year;
- If you were an **active Volunteer firefighter or ambulance worker** for all of last year;
- If you or your spouse received or **expect to receive a K-1 from an estate, trust, or Partnership/S-Corporation**;
- Unless you tell us otherwise, we will check the “Yes” box for the Presidential Election Campaign Fund;
- If you had any **debt cancelled** or forgiven (such as credit cards, car loans, or mortgages) or a negotiated reduction of your mortgage;
- If you sold any stocks or mutual funds even if you don’t think they are taxable; This could include moving funds from one account to another;
- If after reaching age 70½ you **are taking distributions from your IRA and also write generous checks to charitable causes, or if you had one or more ‘Qualified Charitable Distributions’ from your IRA**;
- If you have a student loan with an **Income-Based Repayment**;
- Any documents that you agree to have mailed to you will go by 1st Class mail through the USPS. We cannot be responsible for these items once they have been mailed.

Please bring any of the above issues to our attention if you think they may be relevant to your tax situation.