



The JPT Financial Newswire

A periodic newsletter from JPT Financial Solutions, Inc.

December 18, 2024



JPT FINANCIAL SOLUTIONS, INC.

Eldercare • Advisory • Tax • Accounting

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SPECIAL TAX PREPARATION EDITION **2024 INCOME TAX & NONPROFIT RETURNS**

Happy New Year, and wishing you God's blessings in 2025. To those clients who are returning to us once again for tax preparation, we sincerely thank you for your past patronage and ask that you spread the word to your friends and family of our tax preparation services. To our new clients, we thank you in advance for your business and pledge to serve you with quality and professional customer service. Remember, we're here to help you!

In order for our firm to satisfy IRS requirements to sign-off and electronically file your return as a "paid preparer", it is required that clients remit payment to our firm upon receipt or notification of the completed tax return and prior to the electronic filing of your return. As such, payment to JPT Financial Solutions for your tax return is due upon receipt or notification of the completed tax return. A compounded 1.5% monthly interest late fee will be reflected on all past due accounts over 15 days.

In general, tax return preparation fees are calculated in proportion to the amount of work necessary to complete your return. This includes time spent assembling and reconciling documentation supplied by the client, as well as follow-up discussions with the client (verbal and/or written e-mails) for supplemental data or clarification of information received from the client.

Where necessary, our firm will request a retainer deposit payment from you in advance of tax return preparation and/or related services that are of a sizeable nature. Terms of this agreement will be shared with the client in advance as determined by our firm.

Thank you in advance for your kind assistance and for letting us be of service to you. If you have any questions please don't hesitate to contact us.

● PREPARATION OF 2024 PERSONAL INCOME TAX RETURNS

This section of the “Special Tax Preparation Edition” for the preparation of 2024 personal income tax returns is currently under development and will be updated shortly. Please contact us if you have any questions.

● PREPARATION OF 2024 BUSINESS INCOME TAX RETURNS

This section of the “Special Tax Preparation Edition” for the preparation of 2024 business income tax returns is currently under development and will be updated shortly. Please contact us if you have any questions.

● PREPARATION OF 2024 GIFT TAX RETURNS

This section of the “Special Tax Preparation Edition” for the preparation of 2024 gift tax returns is currently under development and will be updated shortly. Please contact us if you have any questions.

● PREPARATION OF 2024 TRUST, ESTATE & INHERITANCE TAX RETURNS

This section of the “Special Tax Preparation Edition” for the preparation of 2024 trust, estate & inheritance tax returns is currently under development and will be updated shortly. Please contact us if you have any questions.

● PREPARATION OF 2024 NONPROFIT RETURNS

This section of the “Special Tax Preparation Edition” for the preparation of 2024 nonprofit returns is currently under development and will be updated shortly. Please contact us if you have any questions.

The JPT Financial Newswire is a periodic publication of JPT Financial Solutions Inc. This newsletter is distributed as a service to current clients, prospects, business associates & friends. Please feel free to forward this newsletter to a friend or associate who may find it beneficial.

JPT Financial Solutions Inc. is a customer-service driven provider of an umbrella of nonattest professional services including eldercare accounting services, consultation & advisory services, tax return preparation and general accounting services to business and consumer clients.

The greatest compliment you can give is a referral!