

January 9, 2026

*“To provide a thorough, professional tax experience in a welcoming and comfortable environment, all while maintaining a responsive, timely atmosphere that creates long term relationships”*

It is that time of year again. Below is a review of the best procedures for getting your tax information and completing your tax filing.

**MEETING OPTIONS – IN PERSON/DROP-OFF/MAIL-IN/PORTAL**

- In person meetings are scheduled for an hour, but may be as short as 15 minutes. The goal will be to discuss any new issues and review documents.
- If you would like to drop off your return information, or if you mail the organizer to the office, it is very important that you answer the questions in the organizer and review the personal contact information.
- The office also has a portal you can use to securely transmit data and documents. There is no charge for this service. Please let us know if you would like to use this and we can create an account for you. If you do upload documents, please combine documents to keep the number of files to a minimum
- You may also use the “make appointment” option on our website to schedule in-person, phone or zoom meetings.

**WE CAN NO LONGER DOWNLOAD DOCUMENTS FROM ZIPPED/DROPBOX/GOOGLEDOCS. THE PORTAL CAN BE USED TO UPLOAD DOCUMENTS SECURELY, BUT NO COMPRESSED/ZIPPED FILES CAN BE UPLOADED TO PORTAL.**

**PAYMENT OF INVOICE**

- All invoices are due and payable upon presentation. We accept all credit cards, checks and cash.
- You can pay online via our website. The “pay now” button is for secure credit card or check payments.
- **A finance charge of 1.5%/month** will be added to all invoices beyond 30 days.

**INDEPENDENT CONTRACTORS**

- **Forms 1099-MISC & 1099-NEC must** be issued timely to avoid and protect against penalties, which vary from \$50-\$500 per 1099 that should have been issued. The due date is generally 1/31/26.

**PAPER VS. DIGITAL COPIES OF RETURNS**

- If you request a digital copy of your return we will be using our “SafeSend” system. You will receive an email from SafeSend. After you register your account with a password you can then review, Docusign the return and pay the invoice.
- The SafeSend link is good for 7 years. You will need to keep this link for future reference. The return is not on our portal or website.
- If you sent us originals for your documents, you will need to pick those documents up from the office. You can request they be mailed to you, but this may incur a fee.

**IRS IS NO LONGER ACCEPTING PAPER PAYMENT OR ISSUING PAPER REFUNDS**

- Effective immediately the IRS will no longer accept paper checks or issue paper checks for refunds.
- You will need to make payments via IRS website “direct pay” feature and MN Revenue website.
- You can also set up any payment to be made automatically on due dates when return is submitted to IRS electronically. You need to supply the office with bank type (checking/savings) name/account/routing information.

#### **ITEMIZED DEDUCTIONS MAY BE MORE COMMON**

- The tax bill for 2025 changes amounts that can be deducted as itemized deductions. As a result, you may want to gather deductions that were not helpful in prior tax filings. This can include auto tabs and charitable contributions.
- Interest paid on new vehicle purchases made in 2025 may also be deductible.

#### **TRUMP ACCOUNTS FOR NEWBORN CHILDREN**

- Contributions to trump accounts for newborn children will require filing of form 709, Gift Tax.

#### **ANNUAL SALES TAX FILINGS**

- Failure to file annual sales tax returns, even if zero amount due on return, can result in penalty of \$100.

#### **BUSINESS MILEAGE**

- A mileage log is required to substantiate any deduction claimed on the tax return.

#### **SOCIAL MEDIA & TEXTING**

- Jacobson & Young does not communicate via texting or social media. Telephone or email are the ways to communicate with our office.

### **OFFICE POLICIES AND SERVICES**

#### **FRONT DESK OFFICE HOURS-TAX SEASON**

- Monday through Friday our front office is staffed from 9:00 a.m. to 5:00 p.m., with appointment times starting at 9:00 a.m. and going as late as 6:00p.m.. Saturday our front office is staffed from 10:00 a.m. to 2:00 p.m., with appointments starting at 10:00 a.m. and going till 3:00 p.m. No appointments are taken on Sundays. ***Please note for those of you who make a Saturday appointment, our building's front door locks around noon. You will need to have access to a cell phone or call in advance to be let in.***

#### **IMPORTANT REMINDER**

- ***Before we can file your returns electronically, we need to receive a signed e-file authorization form (8879).*** This authorization form will be provided to you with the finalized copy of your completed tax returns. You must sign the authorization form and either drop off at office, mail, email or fax it to our office. This form can be signed electronically if sent digitally via SafeSend process. ***We cannot electronically submit your returns until we receive this signed authorization form. Last year's signature is not applicable. Please note that if you are filing a joint return, both taxpayers need to sign the form.***

#### **COPIES OF INDIVIDUAL TAX RETURNS**

- You can choose to receive a paper copy of your individual return or a digital copy via SafeSend at time of filing. Paper copies are the default treatment.
- **Additional paper copies of returns will incur a minimum \$55 fee.**
- We do not provide both digital and paper at time of filing the return.

#### **EXTENSIONS**

- **We do not automatically file extensions.** You must contact our office to let us know your intention if you want assistance with filing an extension. We recommend contacting the office prior to April 1<sup>st</sup>.

#### **DOCUMENT RETENTION**

- All original documents are returned to you via pickup from office or mail (there may be a fee) or scan.
- Jacobson & Young does scan and retain your documents for a minimum of 3 years.

**SECURITY**

- The secure portal is the preferred method for exchanging documents securely. This is accessed via our website and will require a username and password. If you don't have a portal, we will use encrypted email which is one way secure only and will also require a username and password. These two systems are separate.
- A signed Client's Consent to Disclose Financial Information statement is needed prior to the firm being allowed to send a copy of your return to any address but yours, the taxpayer. Copies of this form are on our website and can be signed and returned to our office via regular mail, fax or e-mailed as a PDF.

**CALENDARS**

- Pocket calendars are available in the office for a limited time. You can stop by any time to pick one up.

We look forward to seeing you and appreciate you giving us the opportunity to work with you.