

Dear Tax Client:

We hope that this letter finds you and your family well. In this communication, please find our *Engagement Letter, Consent to Use Form, Client Intake Data Sheet*, and a *2025 Tax-Year Checklist*. **Please complete/sign and include the engagement letter, consent to use, and intake sheet when you submit your tax documents** in the enclosed return envelope.

If you prefer to deliver the documents electronically, please contact our office and we will provide you with instructions for secure delivery. **If dropping off or picking up your tax documents OUTSIDE of our regular office hours (8:30-4:30), please call-in advance (585-935-5300).**

We will be delivering your completed tax returns electronically through SafeSend Returns unless you request otherwise. SafeSend Returns is a user-friendly and highly secure technology solution that allows you to manage your tax returns from the convenience of a computer, tablet, or smartphone. When the returns are delivered, you will receive an email from **High Falls Advisors at noreply@safesendreturns.com**. If you do not see an email from High Falls Advisors at noreply@safesendreturns.com, please check your spam or junk folder.

The Internal Revenue Service will begin accepting tax returns in late January. The filing deadline this year is April 15th, 2026. To file by this date, we ask that you forward your tax documents to us by **March 31st, 2026, at the latest**. If these documents are received after this date, we may have to file an extension.

As a reminder, many of your tax forms are available online and may no longer be mailed in paper format. When submitting your tax documents, the most common omissions we see are the NYS unemployment forms (1099-G), student loan interest forms (1098-E), retirement distribution forms (1099-R), HSA distribution forms (1099-SA) and college tuition statements (1098-T).

Please visit our new and updated website at www.highfallsadvisors.com to access additional tax resources and worksheets to help you prepare your tax data (click “Client Resources” and select “2025 Tax Tools”). If you would like a personalized tax organizer, please call our office or e-mail tax@highfallsadvisors.com.

We look forward to working with you this year and wish you and your family a happy and healthy 2026.

Sincerely,

High Falls Advisors