It is tax season time again!

We truly appreciate your business and look forward to working with you this tax season.

As always, we are committed to providing quality service with a personal touch as we continue to upgrade and expand the level of service and technology required to meet your tax, accounting, and financial needs. **You may send us your tax documentation in the following ways:**

1. **Drop it off at our office:** 402 Peck Ln, Orange, CT, 06477
2. **Secure Client Portal:** https://www.encyro.com/likethewind
3. **Mail:** Like the Wind LLC 402 Peck Ln, Orange, CT, 06477
4. **Fax:** n/a
5. **Email:** mokolakul@remotebooksusa.com

Upon receipt of your information, we will review your documents and then contact you with any questions we may have.

Please note the following:

Your Tax Checklist is on page 2 of this letter

We urge you to consider dropping off or sending us your tax documents so that we can process them more efficiently.

- To ensure accuracy, we will contact you by telephone or email with any questions or open items that we may have to complete your tax filings.
- Upon completion of your filings, we will get back to you with your tax return result. You will need to E-sign the form 8879 upon reviewing your tax return before we submit with the IRS.

Thank you,

Like The Wind LLC dba RemoteBooksUSA

PRIVACY POLICY: WE COLLECT NONPUBLIC INFORMATION ABOUT YOU FROM THE FOLLOWING SOURCES: 1) INFORMATION WE RECEIVE FROM YOU ON APPLICATIONS, WORKSHEETS AND OTHER FORMS, 2) INFORMATION ABOUT YOUR TRANSACTIONS WITH US OUR AFFILIATES OR OTHERS, AND 3) INFORMATION WE RECEIVE FROM A CONSUMER REPORTING AGENCY. WE DO NOT DISCLOSE ANY NONPUBLIC INFORMATION ABOUT OUR CUSTOMERS OR FORMER CUSTOMERS TO ANYONE, EXCEPT AS REQUIRED BY LAW. WE RESTRICT ACCESS TO NONPUBLIC PERSONAL INFORMATION ABOUT YOU TO THOSE MEMBERS OF OUR FIRM WHO NEED TO KNOW THAT INFORMATION IN ORDER TO PROVIDE SERVICES TO YOU. WE MAINTAIN PHYSICAL, ELECTRONIC AND PROCEDURAL SAFEGUARDS THAT COMPLY WITH FEDERAL REGULATIONS TO GUARD YOUR NON- PUBLIC PERSONAL INFORMATION.

Personal Tax Checklist

Payment for services is expected at the time of service (Cash, Check or MC/Visa)

_____ Taxpayer/spouse/dependent children: address, phone, email, date of birth, social security numbers, tax ID numbers

_____ New Clients, copy of previous year federal & state fax filings

_____ Copy of your driver's license or government issued ID

_____ Crypto/Virtual Currency (BITCOIN), in 2024 did you receive, sell, send, exchange, acquire or dispose an interest in virtual currency

_____ Did you receive any letters from IRS related to Cryptocurrency holdings

_____ Forms W-2, Income received from your employer

_____ Unemployment, Did you receive unemployment in 2024, if so we need the state Dept of Labor for 1099-G

_____ Self Employed - Forms 1099, Schedules K-1, income records to verify amounts not reported on 1099s (ask for Business Tax Organizer)

_____ Records of all business expenses — check registers or credit card statements, and receipts

_____ Business-use asset information (cost, date placed in service, etc.) for depreciation

_____ Home office information, if applicable

_____ CT Passive Entity Tax Paid on your business entity-copy of CT K-1 showing 2024 Passive Entity Tax Paid

_____ Did you sell your primary residence and/or buy a primary residence (include closing statement)

_____ Rent property income - Records of income and expenses (ask for Rental Income Tax Organizer) Rental property information (cost, date placed in service, etc.) for depreciation

_____ Record of estimated tax payments made (Form 1040–ES)

_____ Pension/401K/IRA/SIMPLE/SEP/Annuity distribution income (1099-R)

_____ Qualified Disaster-related Retirement Distribution - did you take a 2020 distribution

_____ Traditional IRA basis (i.e. amounts you contributed to the IRA that were already taxed)

_____ Social security/RRB income (1099-SSA, RRB-1099)

_____ Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)

_____ Income from sales of stock or other property (1099-B, 1099-S)

_____ Dates of acquisition and records of your cost or other basis in property you sold (if basis is not reported on 1099-B)

_____ Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC)

_____ Investment Expenses - do you have any expenses related to your investment holding (Margin Interest)

_____ Other Income-Gambling income (W-2G or records showing income, as well as expense records), Jury duty records, Hobby income and expenses, Prizes and awards, Trusts, Royalty Income 1099–Misc, any other 1099s received

_____ Record of alimony paid/received – if divorced before 12/31/2018, we need year of divorce and ex-spouse's name and SSN

_____ Forms 1098 or other mortgage interest statements

_____ Real estate tax and auto/personal property tax payment records

_____ Receipts for energy-saving home improvements (i.e. solar panels, solar water heater)

_____ All other 1098 series forms

_____ Charitable Donations - Cash amounts donated to houses of worship, schools, other charitable organizations

_____Records of non-cash charitable donations

_____ Amounts of miles driven for charitable or medical purposes

_____ Medical Expenses-Amounts paid for healthcare insurance and to doctors, dentists, hospitals

_____ Health Insurance-Form 1095-A if you enrolled in an insurance plan through the Marketplace (Exchange)

_____ Form 1095-B and/or 1095-C if you had insurance coverage through any other source (i.e., an employer, insurance company, or government health plan such as Medicare, Medicaid, CHIP, TRICARE, VA, etc.)

_____ Marketplace exemption certificate (ECN) if you applied for and received an exemption from the Marketplace (Exchange)

_____Childcare Expenses-Fees paid to a licensed day care center or family day care for care of an infant or preschooler wages paid to a babysitter (Don't include expenses paid through a flexible spending account at work)

____ Educational Expenses-Forms 1098-T from educational institutions, Receipts that itemize qualified educational expenses, Records of any scholarships or fellowships you received

_____Form 1098-E if you paid student loan interest

_____ K-12 Educator Expenses-Receipts for classroom expenses (for educators in grades K-12)

_____ State & Local Taxes-Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid

_____ Retirement & Other Savings-Form 5498-SA showing HSA contributions, Form 5498 showing IRA contributions

_____All other 5498 series forms (5498-QA, 5498-ESA)

_____Federally Declared Disaster-City/county you lived/worked/had property in, Records to support property losses (appraisal, cleanup costs, etc.)

_____Records of rebuilding/repair costs, Insurance reimbursements/claims to be paid, FEMA assistance information, Check FEMA site to see if my county has been declared a federal disaster area

_____ Income of other adults in your home

_____ Form 8332 showing that the child’s custodial parent is releasing their right to claim a child to you, the noncustodial parent (if applicable)

_____ Did you receive any other letters from the IRS or States?