

January 27, 2025

Dear Client,

Tax season is here, and it's time to get organized. At Sparrow & Company LLC, we're here to guide you through the process and help ensure that everything is in order for filing. With a little preparation, we can work together to make this tax season as efficient and stress-free as possible.

If you need to make an appointment, please call our office at (435) 752-1040. We must receive all tax documents one week before your appointment.

This year's filing deadline falls on Tuesday, **April 15th, 2025**.

Tax organization forms can be found at sparrowtax.com. Click on the **Forms** tab at the top right of the home page. Please take the time to answer the questions in the [Engagement Letter](#). You will need to complete this before we start your return.

The other forms are fillable PDF documents and can easily be saved and securely uploaded. You can upload your documents using the upload tab on our website or this [Upload Link](#).

Just as a reminder, the following items, if applicable, are needed to prepare your tax return:

- Form(s) W-2 (wages, etc.)
- All virtual currency transactions
- Form(s) 1099 (interest, dividends, misc income, payment card & 3rd party)
- Form(s) 1095A (Affordable Care Act Health Insurance information)
- Schedule(s) K-1 (income/loss from partnerships, S corporations, etc.)
- Form(s) 1098 (mortgage interest) and property tax statements
- Brokerage statements from stock, bond, or other investment transactions.
- Real estate closing statements.
- Bank information for refunds. Provide the routing number and account number.
- All returns will be e-filed, and refunds will be direct deposited unless instructed otherwise.
- Some states will require driver's license information to verify your identity.

Additional Helpful Information

- Uploading - When you have received all your tax-related info, please upload the link on our website or this [Upload Link](#). Pictures work great, or you can download the mobile app [Cam Scanner](#).

Please wait until you have all of your documents before you drop off or upload your information.

Sincerely

Sparrow & Company

