

January 19, 2026

Dear Client,

As we head into the 2026 tax season, we remain committed to providing timely, accurate, and professional tax preparation services while continuing to improve efficiency, communication, and overall client experience. To help us serve you efficiently, we ask that you submit your tax documents electronically or drop them off at our office.

Appointments

If you would like to schedule an appointment, please call our office at **(435) 752-1040**. All tax documents must be received **at least one week prior** to your appointment.

Filing Deadline

The 2026 tax filing deadline is **Tuesday, April 15, 2026**.

Required Forms

Tax organization and engagement forms can be found at sparrowtax.com under the *Forms* tab. Please complete the [**Engagement Letter**](#) before we begin preparing your return. The remaining forms are fillable PDFs and can be saved and uploaded securely.

Documents may be uploaded through the Upload tab at sparrowtax.com or using this [**Upload Link**](#).

Items Needed to Prepare Your Return (if applicable)

- W-2 forms
- Virtual currency transactions
- 1099 forms (interest, dividends, misc income, payment card & third-party)
- 1095-A (health insurance marketplace)
- K-1 schedules
- 1098 mortgage interest and property tax statements
- Brokerage statements
- Real estate closing statements
- Bank routing and account number for direct deposit
- Driver's license information (some states require this for identity verification)

All returns will be e-filed and refunds direct deposited unless you instruct us otherwise.

Uploading Tips

Once you have received all of your tax documents, please upload them together. Clear photos work great, and the CamScanner mobile app is a helpful option.

Submitting everything at once helps us complete your return more efficiently and accurately.

We appreciate the opportunity to serve you and look forward to assisting you this tax season.

Sincerely,
Sparrow & Company LLC

