

Thank you for choosing Avant CPAs & Advisors as your trusted CPA partner. We look forward to a successful tax season and highlight important deadlines below to ensure a smooth and efficient process.

OUR TAX SEASON DUE DATES	Due By:
Engagement letters are required before we start work.	Five days after the date received
W-9 Payee information to our office for preparation of Form 1099s. Please refer to our Form 1099 FAQs .	January 22, 2025
Businesses: for timely and accurate filing of your tax returns, submit accounting records and tax documents necessary to complete the tax returns no later than:	February 15, 2025
Individuals: for timely and accurate filing of your tax returns, submit tax records and information immediately as received or by:	March 1, 2025
Important: Unless a Schedule K-1 is still pending, we cannot file your return by the extension deadline if records are incomplete or received after this date.	June 1, 2025
For a complete list of IRS deadlines and due dates for this tax season.	Tax Deadlines

WHAT TO EXPECT NEXT:

1. Sign your **Engagement Letter**. You'll receive an email when it's ready for signature. An engagement letter clarifies our services, firm policies, and pricing and is required before we start our work.
2. Submit your tax documents as soon as possible.
 - a. Refer to our [2024 Records Request](#) for a list of standard tax documents.
 - b. Upload information to your client portal, <https://portal.avantcpas.com> (or use the [mobile app](#)). Enable [two-factor authentication](#) for added security.
3. Complete our tools and templates, if applicable:
 - a. Answering the Tax Questionnaire(s) ensures essential details aren't missed.
 - b. Using your fillable Tax Organizer, if applicable, saves time and reduces errors.
 - c. If a formal bookkeeping system isn't in place, organize your income, expenses, mileage, and home office expenses for a Schedule C business and rental properties using our comprehensive Excel templates. **Please let us know if you'd like one.**
4. Respond quickly to follow-up emails and reminders.

How You Can Help: Your cooperation in providing information promptly is crucial to meeting IRS and state deadlines. Delays may affect extension and estimate calculations. We understand your time is valuable and appreciate your commitment to working with us to achieve a successful turnaround.

Flexible Payment Options: Tax returns are released after payment. To avoid a lump sum payment at completion, you can [prepay in installments](#) through your [client portal](#). Contact us if you have questions or to coordinate a plan that works best for you.