

## Jon's Tax Service Inc.

115 E. Main St

Mount Joy, PA 17552

Phone: (717) 689-5960

JonsTaxService.com

Email: [Jon@JonsTaxService.com](mailto:Jon@JonsTaxService.com)

Happy New Year! I am looking forward to this tax season. There are a lot of new changes to update everyone on that I believe will be a big benefit.

Please let me know:

- If you had overtime pay in 2025. Please bring in your last paystub from 2025.
- If you purchased a **brand-new** vehicle in 2025 and it was assembled in North America you might be able to deduct the interest. Please bring along December's interest statement.
- If you are a PA resident over the age of 65 and make less than \$46,520, as you will probably qualify for a property tax or rent rebate through PA.

If you would like to find out about more changes throughout the year, please like my Facebook page. I post changes as information becomes available.

**Scheduling:** To schedule an in-person appointment, I would recommend calling in before the middle of February to ensure availability. My wife does a great job with all the scheduling and phone calls. If she does not answer, she is most likely on a call with another client. Please leave her a message and she will get back to you as soon as she can; however, she may call back from a different number. You can also email her at [RSattazahn1@gmail.com](mailto:RSattazahn1@gmail.com) or text her for an appointment at [717-813-7461](tel:717-813-7461). You are welcome to drop off your paperwork ahead of time to reduce the duration of your scheduled appointment, if you do this please let the staff know your appointment date and time.

**Office Hours:** Monday– Friday 10am– 8pm (Friday 4-8PM is only in Elizabethtown Office and by appointment only)

Saturday 9am-5pm

Sunday Closed

**Drop-Offs:** Tax return information may be dropped off instead of scheduling an appointment, but we understand that will not work for everyone. No appointment is needed for a drop-off. Last year the majority of the drop offs were completed in less than a week. If you are dropping off paperwork you can do that at either one of our two locations. If no one is in the office you can drop your paperwork in the large mail slot in the entrance door at either office location, 115 E. Main St. Mount Joy or 149 E. Willow St. Elizabethtown. If you are dropping off, please fill out the information form that is included in this letter and include it with your paperwork.

We also have an option to submit your tax documents online instead of dropping them off. My website JonsTaxService.com has a secure Client Portal. If you would like to use this feature, just go to my website to sign up and you will be approved within 24 hours. If you have used it in the past your login will work again this year. If you use this feature and can upload all your documents at one time as a single file, that is preferable to submitting multiple uploads. Feel free to reach out to us if you need help or have any questions.

**Client Organizer:** If any of you would like a personalized client organizer to help you collect the data required for your return based off of last year's information, please email me at [Jon@JonsTaxService.com](mailto:Jon@JonsTaxService.com) and I will email that to you or send it to you in the portal if you signed up. I also have some other organizers for rentals and businesses on our website under that tax forms tab.

**Partnerships and Corporations** if you can get me your information in January or early February that would be great to ensure they are completed by the deadline.

**Refund Advances Available:** If you need your refund in a hurry, I am also able to offer advances on your refund through EPS Financial and have tax prep fees subtracted from your refund. Deadline for refund advance is March 15<sup>th</sup>.

All e-filed taxes returns will again have FREE Audit Protection and ID theft restoration.

**Forms of Payment Accepted:** We accept cash, check, eCheck, or credit card payments. While I can accept credit cards for payment, I want to make everyone aware that the **credit card processor charges the client an additional 3% processing fee**. I prefer checks or cash because it saves you the credit card fees. I am also able to pull the tax preparation charges out of your bank account without any additional fees to you.

As always, please feel free to give me a call if you have any questions or need anything. I look forward to seeing you again this year!

Sincerely,

Jon Sattazahn



One of my office staff hard at work, sending out letters

## 2025 Tax Year

Name \_\_\_\_\_ Email \_\_\_\_\_

Phone \_\_\_\_\_ Can you receive texts at this number? Yes or No

Names of dependents you are claiming \_\_\_\_\_

I certify that I am the only one allowed to claim these dependents and I provided the majority of their support. Signature \_\_\_\_\_

Yes or No ● Do you have any Crypto Currency?

Yes or No ● Do you have any foreign bank accounts?

Yes or No ● Do you have any Tip income? If yes, please list amount \$ \_\_\_\_\_

Yes or No ● Do you have any student loan interest? If yes please include your 1098E.

Yes or No ● Did you contribute to a TRADITIONAL IRA? If yes what was the amount \$ \_\_\_\_\_

Yes or No ● Did you receive a letter from the IRS with a ID Pin? If Yes please include that letter.

Yes or No ● Did you purchase Health Insurance from Pennie website. If yes please include 1095A form.

Yes or No ● Did you have overtime pay? If YES Please include last paystub

Yes or No ● Did you make any energy saving improvements to main home such as, Solar, HVAC, Insulation, Doors or Windows? (this credit ended 2025)

Type of Improvement \_\_\_\_\_ Please include a receipt for items to see if they qualify.

### Job Expenses

Union Dues Union Name \_\_\_\_\_ Dues \$ \_\_\_\_\_

Office Supplies \$ \_\_\_\_\_ Uniforms \_\_\_\_\_

Required Continuing Education you were not reimbursed for \$ \_\_\_\_\_

Other Expenses \$ \_\_\_\_\_

Yes or No ● Did you pay Estimated Tax Payments? If Yes, please fill out below

|                    | Federal | State |
|--------------------|---------|-------|
| 1 <sup>st</sup> QT |         |       |
| 2 <sup>nd</sup> QT |         |       |
| 3 <sup>rd</sup> QT |         |       |
| 4 <sup>th</sup> QT |         |       |

Were you required to work from home in 2025? You may qualify for a home office deduction on the PA state return if you answer Yes to all 3 of these questions below:

- Does your employer require you to maintain a separate work area? Yes or No
- Is this work area the main place to perform work duties? Yes or No
- Is this work area used exclusively to perform work duties? Yes or No

Only if you answered Yes to all the above questions above, please fill out the information below if you would like to claim a PA state credit.

Home SQ Footage \_\_\_\_\_ Office SQ Footage \_\_\_\_\_

Real Estate Taxes \_\_\_\_\_ Homeowners Mortgage Interest \_\_\_\_\_

Utilities \_\_\_\_\_ Property Insurance \_\_\_\_\_

Rent \_\_\_\_\_

#### **Changes from Last Year's Tax Situation**

New Dependent Name \_\_\_\_\_ SS# \_\_\_-\_\_-\_\_\_ DOB \_\_\_/\_\_\_/\_\_\_ Relationship \_\_\_\_\_

Name of Dependent claimed last year but not claiming this year \_\_\_\_\_

Married or Divorced this year? Yes or No

New Bank Info Bank \_\_\_\_\_ Routing# \_\_\_\_\_ Account# \_\_\_\_\_

Email Address \_\_\_\_\_ Phone \_\_\_\_\_

New Address \_\_\_\_\_ Date You Moved \_\_\_\_\_

Changes to Occupation \_\_\_\_\_

Any Changes or Questions?

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