



**SSTAR Services**  
4266 Gem Avenue  
Castro Valley, CA. 94546

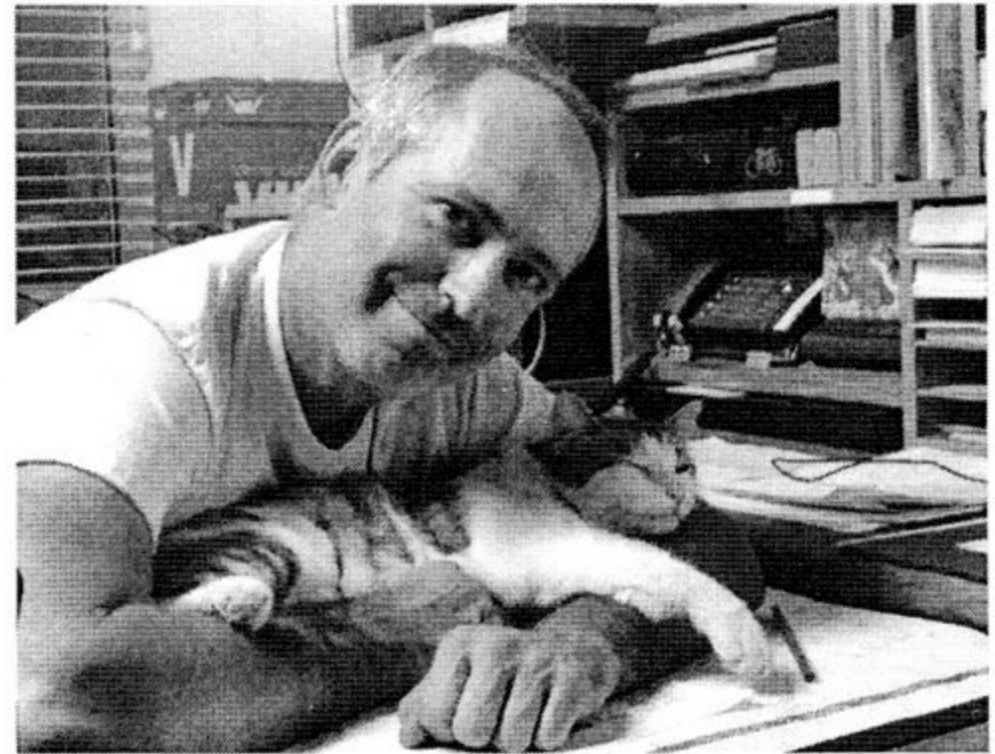
Phn:(510) 583-8035  
Fax:(510) 583-0555  
www.yourtaxreturn.com

Accounting, Real Estate and Tax Services

OK, here we go! Welcome to tax season 2026.

1) **Fee Collect is no longer an option.** The service was discontinued. Tax prep fees are due when the return is signed. Either cash, checks, credit cards, Paypal, Venmo and Zelle. Any transaction based on a credit card carries a 2.5% additional charge (my cost) as well.

2) There are changes this year (ex: overtime being exempt from taxes) that do not seem to have any reporting requirements. The W2 for 2025 is unchanged from 2024. It MAY be reported in box 14 (code TT). **EXAMPLE:** Pay rate \$30, Overtime rate \$45, 100 hours of overtime worked. Total overtime pay is \$1500  $((45-30)*100)$ . Get this one right. Please complete ACW Page 2 Items 20, 21, and 22 (Overtime, Car Interest and Tips) as necessary. **No number, no deduction.**



3) No new clients **EXCEPT** family members - and by this I mean people whose return might affect yours (dependents, spouses, etc). Not simply someone related to you.

4) If you need me to issue 1099-NEC's to your contractors, or you need a 1099-NEC issued to you to prove income, please give me this information before **January 25th.** The forms are due to the IRS on January 31st and late forms are regarded as suspect.

5) I am not raising general rates this year, but there are **NEW** forms that have never existed before that I will charge for (ex: Schedule 1-A, and a more complex Form 8867). Nothing changes if these new or revised forms do not apply to you.

6) Once you have your tax documents 100% ready, send them to me right away. Please do **NOT** wait! I will start preparing 2025 tax returns on January 13th, 2026.

7) Some tax forms (1098-T Tuition, 1095-A Subsidized Health Care, Brokerage Statements for Stock Sales) are not always mailed (on time) and best downloaded. Take the initiative, get the form, don't wait for it to find you.

8) If you have anything in box 10 of your W-2, or a code "W" on box 12, **PLEASE** complete the info on ACW page 1 (items 7 and 8) that is associated with these codes.



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- 9) ACW Page 1 Item 2 - it's "county", NOT "country". Do NOT put "USA" ☺
- 10) The law regarding the reporting of minimal on-line payments (PayPal, Venmo, Zelle, etc) is now **RESCINDED**. Sell your toys, collectibles, leftover turkey and unwanted relatives on Mercari and E-Bay without any tax implications. Hooray!
- 11) If I ask you to send me specific information via e-mail, please type the requested information (actual text). Do NOT send me pictures of receipts or documents. I prefer to cut and paste numbers to maintain 100% accuracy. Not possible with pictures.
- 12) My phone (510) 583 8035 is the most stable, reliable form of phone - a land line. **PLEASE do not send text messages, I will not get them.**
- 13) Dropping off your tax forms? **OPEN** all forms, envelopes, **UNFOLD** everything, and place in a large envelope before depositing in my drop box. **PRETTY PLEASE.**
- 14) The fill-in PDF worksheets are designed to maximize the font size for easy readability. Apple devices seem to minimize the font size. Please fix this before you send me the document. If it is so small I cannot read it, it is useless.
- 15) **TOP THREE MISSED ITEMS** - Identity Protection PIN numbers (IRS mails these every year to anyone who requested them ) and Form 1095-A (subsidized health insurance). If you applied for this coverage it's easiest to download the form. Form 1098-T (Tuition Expense) is usually not mailed and should be downloaded also. I cannot retrieve these items for you, not tell you how to get them.
- 16) If you need an extension, you must e-mail me the request. I do tax returns until July 15th, and then (with rare exceptions) I am done. I am all about refereeing soccer after tax season and do not want to come home and do tax returns after my matches.
- 17) I need you to use my worksheets - I don't do tax returns from information on post-it notes. Every worksheet is available on the web site. If it does not apply to you, leave it blank. Writing in a bunch of "zeros" in fields that should be left empty just distracts me from the actual numbers in the fields that **ARE** important.
- 18) Dependent Income is NOT your income. It goes on **THEIR** return, not yours. Yes, they can still be a dependent on your return if they (otherwise) meet the criteria.



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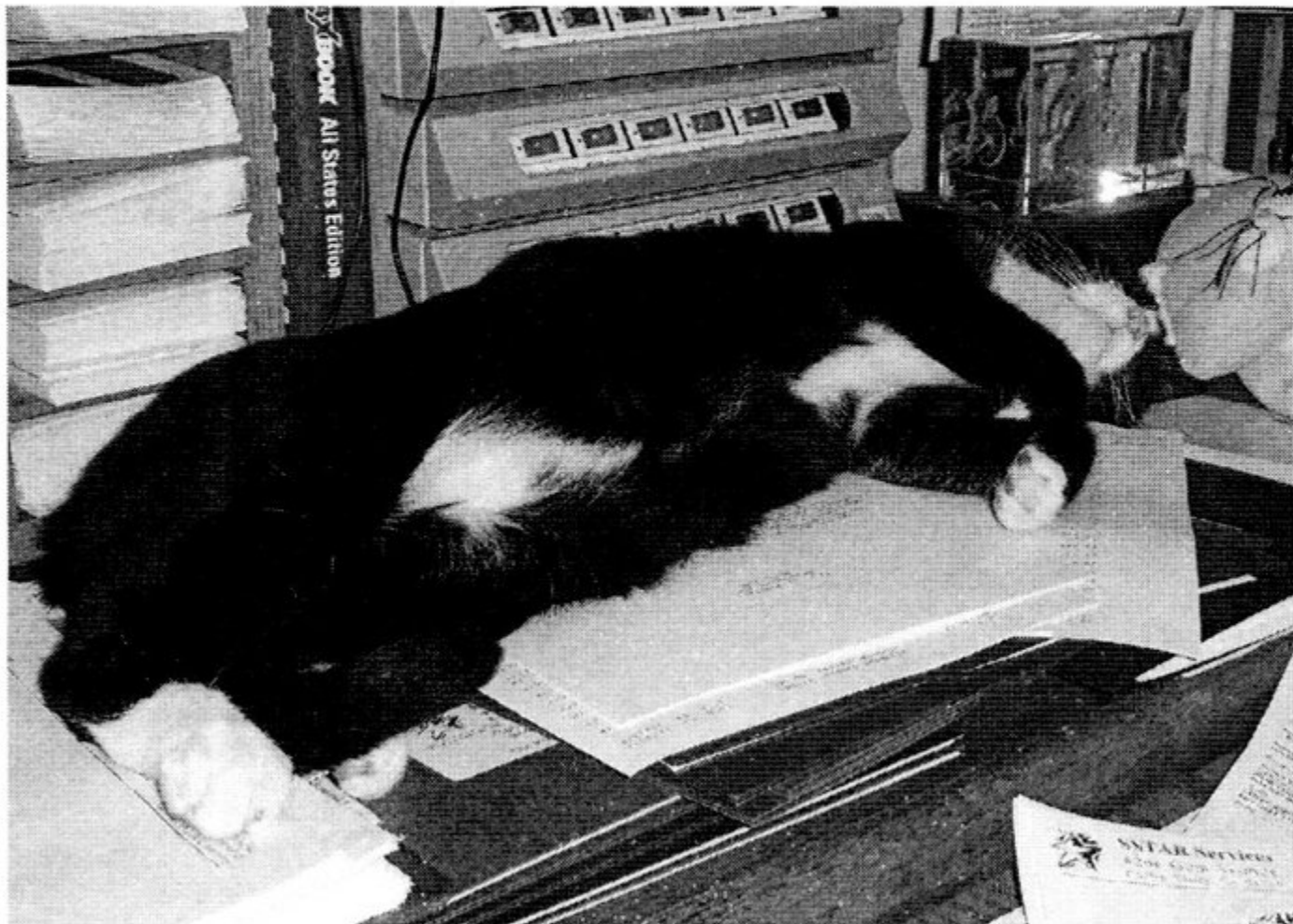
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19) RECORD an outgoing announcement on your phone so I know I've reached the right party and I can leave a message. Otherwise - NO ID - I have to hang up ☹. I find this EXTREMELY annoying. Eventually I will just stop trying to contact you. Not sure how to do it? Ask your phone. It will gladly tell you. ☺

20) Please use the correct "Income and Expense Statement" for your type of business (Sole Proprietorship, Partnerships, Corporations or LLC's). HOWEVER - A rental property is always a rental property, regardless of its entity type. If it's an LLC, complete the Rental Income and Expense for the property and complete the Business Income and Expense (for LLC's) for LLC expenses not directly related to the property.

So Merry Christmas, Happy New Year, Peace, Good Will and Refunds to All!



Stacy Spink  
SSTAR Services

Socks after a tough day at the office ... I work these cats too hard sometimes ... ☺