



TAX PREPARATION SERVICES

IMPORTANT DEADLINES

- **4/15/26** - Tax filing deadline
- **3/27/26**—Tax files must be received at PWM to guarantee filing by the IRS deadline. Files received after the 3/27/26 deadline will be filed on extension.

CRITICAL ITEMS FOR TAX PREPARATION

- Valid state issued photo ID
- A complete copy of the previous year's returns
- All forms W-2, 1099 & 1098
- Property tax receipts
- Detailed income and expense information for small business and rental real estate
- List of charitable contributions (date, amount & name of charitable organization.)
- Any additional information pertaining to the current tax year

2025 TAX PREPARATION PRICING*

SILVER	GOLD	PLATINUM
Starting at \$195	Starting at \$350	Starting at \$650
"Touchless" tax preparation	30 minute live review	
Deadline to submit tax docs: 2/21/2026	Deadline to submit tax docs: 3/20/2026	Comprehensive tax planning

TAX FORM MAILING DATES

Investment related tax documents such as **consolidated 1099's will generally not be mailed until late February**. If you hold securities (usually mutual funds) that report undistributed capital gains, these gains will be reported on a form 2439 which will not be mailed to clients until **mid March, 2026**.

*** Additional fees may apply for engagement outside the scope of the pricing schedule.**

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