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Dear Friends,

Before getting into our fall updates and the upcoming tax season, we wanted to share some personal news. This past April, John's son and Ed's brother, Stephen passed away after a short illness. It has been a difficult time for all of us, and we have spent quite a bit of time away from the office helping our family take care of his affairs.

During that time, we were reminded once again of how important family, relationships, and the people around us truly are. We want to thank all of you for your patience, understanding, and kindness as we navigated this difficult period. We truly appreciate the cards, e-mails, and donations to Stephen's trust that was established for his children.

As we move into the fall, things are getting back to a more familiar routine, and that means tax season will be here before we know it!

Our 2027 calendar is now open for booking your tax appointment. We encourage you to reserve your appointment early, especially if you have a preferred day or time. For virtual and phone appointments with John, you can call now to make that appointment, but we will need your documents in our office 10 days – 2 weeks prior to that appointment. Your virtual appointment will have to be rescheduled if we do not have your documents in advance.

We are excited to welcome Rachael Mason to our team! She will be joining us as a tax preparer and will be preparing tax returns during the upcoming tax season. We're very happy to have her on board and look forward to introducing Rachael to many of you. We're confident that she will be a valuable addition to our team and will provide the same level of care and attention that you have come to expect from our office. As John begins to gradually transition some of his workload, Rachael will take on some of his tax returns.

**Extensions & Estimated Taxes:** The deadline for completing your 2025 tax return is October 15, 2026. For those of you currently on extension, we need to have all your data in our office no later than Friday, September 18, to give us enough time to process the returns and get them back to you prior to the deadline. We cannot guarantee completion of a tax return if the data is dropped off after September 18, 2026, and you may be subject to late filing penalties and interest charges.

Third quarter personal estimated tax payments are due by September 15. Please get us your data as soon as possible to give us enough time to calculate those payments. The fourth quarter personal estimated tax is due on January 15, 2027.

**NJ Anchor Rebate:** The State of NJ will automatically file many of the Anchor rebates this year. NJ is mailing letters to homeowners and renters that have filed in the past.

Be sure to read the letter to see if you need to take any action or if NJ has your proper information on file. This Anchor Rebate is based on your home ownership status as of October 1, 2025. If you have never filed the Anchor Rebate in the past and/or you do not receive a letter or application from NJ in the mail, you may have to go through identity verification through ID.me. To check the status of your Property Tax Rebate, enter your information here, <https://propertytaxreliefstatus.nj.gov/>.

Our next newsletter will be sent out in early January, and we will include our annual checklist to help you organize your documents. We will also require the completed Drop Off/Mail In form to be included with your documents when dropping off, uploading, or mailing. You can complete the form and include it with your documents when submitting them or we will have them at the office for you to complete when dropping off. We will not start working on your return until we have a fully completed form in your file.

Thank you again for allowing us to be your trusted tax professionals. We look forward to working with you in the coming year and, as always, we appreciate your continued business and confidence in us. Wishing you and your family a happy, healthy, and peaceful fall.

Best Regards,

*Ed, John, Carrie, Rachael, & Michele*

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