
2025 Year End Newsletter

January 16, 2026

CONTACT INFORMATION

Glenn R. Luisi Accounting, Inc.
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Main Email: info@grluisi.com
Documents: documents@grluisi.com
Requests: requests@grluisi.com
Website: www.grluisi.com
Client Portal: www.grluisi.com/portal

EXTENDED TAX SEASON HOURS

February 2, 2026 thru April 15, 2026

Mon. thru Thurs.	9:00 am – 8:00 pm
Friday	9:00 am – 5:00 pm
Saturday	9:00 am – 3:00 pm
Sunday	CLOSED

Hours between 5:00 pm and 8:00 pm
are by appointment only

ORGANIZER

If you prefer receiving a client organizer prior to compiling your tax information, please contact us and we will email, fax, or mail yours to you immediately.

PRIVACY POLICY

The Gramm-Leach-Bliley Act requires accountants and tax preparers to report their privacy policy annually to their clients. This year's privacy policy for Glenn R. Luisi Accounting, Inc. will accompany your copy of your 2023 income tax return. It is also always available upon request and on your Master Services Agreement.

Enclosed is a

2025 TaxUpdate Annual Newsletter

We hope you find it informative and easy to read.

We have also enclosed a

TaxUpdate Special Edition Newsletter

outlining new 2025 tax legislation.

A BIG YEAR AHEAD

While our firm did not have many changes over the past year, our nation's tax laws certainly did. Most of you have heard the headlines and are familiar with some of the notable changes from the One Big Beautiful Bill Act (OBBBA) that was signed into law on July 4th.

To help summarize the new laws and to prepare you for this upcoming filing season, we have provided our clients with a special edition of our TaxUpdate Newsletter, in addition to our annual one. These tax laws impact everyone so please read through them and let us know if you have any questions.

IMPORTANT UPCOMING COMMUNICATION

Tax year 2025 serves as a transition year for some of these new tax laws. Because of this, within the next week, we will be sending out an additional email to all clients with some important information on documents we may need to complete your tax preparation this year. Please be on the lookout for this email and do not hesitate to contact us with any questions on what documents you may be required to send us.

REVIEW OF POLICIES & PROCEDURES

We encourage you to please review our current policies and procedures, which are always sent alongside this newsletter. Please pay special attention to our use of engagement letters and our process for completing tax returns prior to the filing deadlines. Our payment terms, taxpayer responsibilities, requirements for obtaining e-file authorization, our privacy policy, and our record retention policy are also detailed.

(over, please)

WE LOVE REFERRALS & REVIEWS

Our largest form of advertising comes via word of mouth from our existing clients. The biggest compliment we can receive for the services we provide is a referral to others. We also provide an incentive for those referrals – refer someone who completes a service with us and we'll give you \$25 off your next tax preparation fee. Just let your referral know to tell us who sent them. That's it!

We also encourage you to leave us a review on our website. With an ever-evolving online presence, these reviews are critical in helping prospective clients see the incredible value we provide to those who put their trust in our firm. We also invite you to spread the word online further by leaving us reviews on Google, Yelp, Facebook, and/or LinkedIn.

PHONE CALLS & APPOINTMENTS

Throughout the year, Alex and I are consistently busy completing tax returns, working on corporate accounting services, or on the phone with clients. To minimize distractions and operate at an efficient pace, we may not always answer the phone whenever it rings. However, we do our best to return phone calls as soon as possible, usually within 48 hours.

While we do log all phone calls to return, we highly recommend our clients book a call with us using our online booking system. This helps make sure we are available and adds the call automatically to our calendar. Booking meetings is easy from our website and gives you the option to pick the type of meeting (phone or Zoom) and the meeting duration that you feel is appropriate for the discussion. We also have options for tax return preparation and review.

With so much going on every day, our calendar has become a focal point for making sure we are on top of client communication and tasks. Placing calls and meetings on our calendar ensures we have time set aside for our clients so that we can provide them with the best possible service.

ENGAGEMENT LETTERS (SOWs)

As always, we rely on signed engagement letters to outline all work completed by our office and the associated professional fees we charge for that work. You can read more about this in our Policies & Procedures. Please make sure to sign and return your 2025 income tax preparation SOW as soon as possible or send it with your source documents.

CLIENT PORTAL & E-SIGNATURES

Our ShareFile client portal is an integral part of our firm. The portal allows us to store completed tax return documents and source documents, as well as financial statements, payroll reports, and other documents for our clients. It also allows our clients to upload and share documents with us, as well as retrieve or view their tax documents at any time without needing to contact us, such as for obtaining a mortgage or refinancing an existing one. While we do not currently require use of the portal, we do encourage you to take advantage of this valuable service. If you do not already have access to the portal, please let us know so that we can set you up.

We also use RightSignature for sending documents for electronic signature(s), which automatically get saved to ShareFile after they are signed. If you have any issues while using RightSignature, please contact us right away.

YOUR OPTIONS FOR TAX PREPARATION

We offer income tax preparation services through the following two options:

- 1) Mail, email, upload, or fax your tax information to us and we will process and return it in a timely manner. We will follow up to review the return. Uploading your tax information to the client portal is the safest form of transmission. Each client has a 'Source Documents' folder located under 'Tax Year 2025'. This is the ideal place to upload and store your documents used for income tax preparation.
- 2) Call us, email us, or visit us on our website to schedule an appointment during normal business hours to complete your tax return over the phone. We do, however, now require all source documents to be sent to us in advance of your appointment. This allows us to expedite the tax preparation process, making us more efficient and keeping our fees lower.

THANK YOU

As always, we are looking forward to welcoming new clients this year. Thank you in advance for your referrals, as well as your reviews on our website and social media platforms.

We wish you and your family a Happy New Year and look forward to speaking with you this tax season!

Very truly yours,
Glenn R. Luisi II