

Welcome Back to the 2026 Tax Filing Season

Dear Valued Client,

Happy New Year! We hope this message finds you well and ready for the upcoming **2026 tax filing season**. We truly appreciate your continued trust in **JB Bookkeeping Cardinal & Larson Taxes LLC**, and we look forward to assisting you again this year.

As part of our ongoing efforts to improve efficiency and better serve our clients, we are giving you updates on our **tax preparation process** as well as important **tax law changes** you should be aware of this season.

What's New for 2026 – Our Process

To streamline preparation and reduce waiting times, we will now be using a **drop-off or secure upload system** for tax documents.

Here's how the process will work:

- You may **drop off your documents** at our office or **upload them securely** through our portal.
- Once your tax return has been completed, **we will notify you**.
- At that time, we will **schedule a review and finalize appointment**, if one is needed, to go over your return and answer any questions before filing.

For **more complex tax returns** where documents are uploaded, you may receive a **short, recorded video review** explaining your return. This video will be sent through our **secure client portal** to help you better understand your return prior to finalization.

Special Accommodations

For clients who are **physically challenged or require transportation assistance to visit our office**, we will continue to accommodate in-office service. In these situations, you may **wait on-site**, and we will **review and finalize your return during your visit**.

Important Update for Clients Previously Seen by Chris

If **Chris prepared your taxes last year and you met with him in an appointment**, his scheduling will be handled a little differently this season.

- Chris will **prepare your tax return** as usual.
- A **Google Meet review appointment** will be scheduled.
- You will **come into our office**, where you will **review your return with Chris online** via Google Meet.
- Your return will then be **finalized and filed with assistance from our in-office staff**.

This updated process allows continuity in working with Chris while ensuring timely support from our office team.

Tax Organizer Availability

If you would like a **full tax organizer**, please **call our office**, and we will be happy to **email or mail a copy to you**.

Important Deadlines

To ensure your return is completed on time **without the need to file an extension**, all tax documents must be **received by our office no later than: 🏠 March 25, 2026**

This allows sufficient time to prepare, review, and file your return by the **April 15, 2026 filing deadline**. Documents received after this date may require an extension to be filed.

Important Tax Law Updates for the 2026 Filing Season

There have been several **tax law changes** that may impact your return this year, including but not limited to:

- ❖ **Tax on Tips** – Employees and self-employed individuals can deduct up to \$25,000 tips income that are reported on Form W-2 or 1099. The deduction is only limited to certain occupations set by the IRS and subject to income limitations. Married taxpayers must file jointly to qualify for the deduction.
- ❖ **Tax on Overtime** – Taxpayers can deduct overtime compensation reported on Form W2 or 1099 up to \$12,500 or \$25,000 if married filing jointly. The deduction is subject to income limitations and must be filing jointly if married to qualify.
- ❖ **Car Loan Interest Deduction** – Taxpayers can deduct interest of up to \$10,000 on loans originating after December 31, 2024 that are used to purchase new personal use vehicles that are assembled in the US.
- ❖ **Additional Deduction for Seniors** – Taxpayers aged 65 and older may qualify for additional deduction of \$6,000 per taxpayer given that their modified adjusted gross income (MAGI) is within the qualified income limits.
- ❖ **Child Tax Credit** – The CTC was increased to \$2,200 per qualifying child for qualified taxpayers.
- ❖ **State and Local Tax (SALT) Deduction** – The maximum allowable SALT deduction was increased from \$10,000 to \$40,000 (\$5,000 to \$20,000 for married filing separately) subject to phaseout for high-income taxpayers. SALT includes state and local real property taxes, state and local personal property taxes, and either state and local income taxes or general sales taxes.
- ❖ **Clean Vehicle Credit** – The tax credit for purchasing qualified electric vehicles ended as of September 30, 2025.

Because tax laws impact each taxpayer differently, our review process ensures these changes are properly applied to your individual situation.

Please also be reminded to inform us of any changes in your tax information, including but not limited to change of address, marital status, and addition or removal of dependents.

2026 Tax Season Office Hours

San Bruno Office

- **January 5 – January 27:**
Monday–Friday | **10:30 AM – 5:30 PM**
- **January 28 – April 15:**
Monday–Friday | **9:30 AM – 6:00 PM**
Saturday | **10:00 AM – 2:00 PM**

Walnut Creek Office *(beginning February 1)*

- Sunday | **11:00 AM – 2:00 PM**
- Monday | **12:00 PM – 6:00 PM**
- Tuesday–Thursday | **9:00 AM – 11:00 AM**

Please visit taxladyjas.com/taxseason/ for important information, required documents, helpful worksheets, and access to our secure client portal.

If you have any questions about these updates, you need a tax organizer, or would like assistance in submitting your documents, please don't hesitate to contact our office. We are here to help every step of the way.

Thank you again for choosing **JB Bookkeeping Cardinal & Larson Taxes LLC**. We look forward to working with you this tax season!

Warm regards,



Jasmin Baros & Team
JB Bookkeeping Cardinal & Larson Taxes LLC