

PROFESSIONAL  
SERVICES

Season's Greetings Family! It is time to start preparing for the 2024 tax season.

**We will have very limited face to face appointments this year.** If you would like one of these please contact us at [info@psbtstax.com](mailto:info@psbtstax.com) or 303-425-9119. The preferred method is dropoff or upload to portal.

- -Upload to our secure portal <https://professionalservices.securefilepro.com/portal/#/login> (upload your docs through the Guest Exchange), email to [info@psbtstax.com](mailto:info@psbtstax.com), mail or drop off.
- We will continue the first come-first serve drop off system for 2024 taxes. Your return will not be started and put in the pending file until all documents are received. Please only upload, email, or mail your documents when you have everything to complete them.

Tax returns must include the following in order to be put in the queue for processing:

- Payment - We accept cash, check, Venmo (@betty-smith-85), Zelle (info@psbtstax.com) and credit card, but please note credit card payments are subject to a 5% fee.
- Signed authorization form for all taxpayers (forms are on website)
- Basic taxpayer information sheet (If there have been any changes since last year)
- Any questions you would like Betty to address
- Valid contact number if Betty has questions
- Driver's license number, date issued & expiration date.

To ensure your taxes are prepared without the possibility of needing an extension, your tax paperwork **MUST** be submitted by March 15, 2025. An extension will be filed for any documents received after March 15, 2025 and that will not be completed in time. If you need an extension and we do not have your tax documents you need to submit a \$50 fee and extension request.

When your taxes have been completed, we will notify you using the contact information provided in the updated taxpayer information sheet. Most returns can be signed through DocuSign, which you will see come from Shauna when your taxes are completed. We will be sending all completed returns **electronically** this year unless a paper copy is requested. **Any additional copies requested throughout the year will be a \$75 fee paid up front.**

Betty Smith and Shauna Philippus  
[www.bettysmithprofessionalservices.com](http://www.bettysmithprofessionalservices.com)

