



The A&B Newsletter

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Welcome Back. . . .



IMPORTANT DATES!

- November
- Nov. 15 - Monthly Payroll Deposits Due
 - Nov. 15 - 990 Returns Due
 - Nov. 20 - Monthly Sales Tax Returns Due
 - Nov. 28 - Office Closed / Holiday
 - Nov. 29 - Office Closed / Holiday

[View Full Calendar](#)

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Pre-paid QuickBooks and Sage 50 Support - Discounted Blocks of Time Available

If you need help with QuickBooks or Sage 50, our firm offers support for your computer needs. We offer discounted blocks of time to make this service convenient and affordable.

Discounted Block of Time

\$95/Hour - Minimum of 4 hours

Use our simple and easy-to-follow checklists to assemble your individual and business tax documents.

Deliver your information to us early so we can prepare your tax returns quickly and accurately.

Our open billing rate for this service is \$125/Hour. When purchasing discounted blocks of time, you will see a significant savings.

Individual

Contact our office at 724-832-2244

Business

Taxpayers Should Review The Education Tax Credits Before They File

There are **two education tax credits** designed to help offset education costs: the **American Opportunity Tax Credit** and the **Lifetime Learning Credit**.

Eligibility Requirements

For both tax credits, to be eligible:

- The taxpayer, their spouse or their dependents must take post-high school coursework in tax year 2024.
- The student must have a **Form 1098-T, Tuition Statement**, from an eligible educational institution. There are **exceptions for some students PDF**.

Things Taxpayers Should Know About The Education Tax Credits

The American Opportunity Tax Credit is:

- Worth a maximum benefit of up to \$2,500 per eligible student.
- Available only for the first four years at an eligible college or vocational school.
- For students pursuing a degree or other recognized education credential.
- Partially refundable. People could get up to \$1,000 back.

The Lifetime Learning Credit is:

- Worth a maximum benefit of up to \$2,000 per tax return, per year, no matter how many students qualify.
- Available for all years of postsecondary education and for courses to acquire or improve job skills.
- Available for an unlimited number of tax years.

Claiming The credits

To claim either credit, taxpayers must complete **Form 8863, Education Credits**, and file it with their federal tax return.

More information

- **Compare education credits**
- **Tax benefits for education: Information center**

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Check out our Facebook Page – we are just a click away!

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Where is my Refund?

Click the links below to track your refunds

Federal

Pennsylvania

Pennsylvania Property/Tax Rent
Rebate



Client Appreciation Referral Program

Refer a friend who becomes a client of our firm and receive a \$100 credit on your account.

Simply tell them to let us know you referred them and we will take care of the rest.

If the new client has more than one referral, the credit will be split between the referring parties.



Our Firm appreciates the opportunity to serve your professional needs!

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