



## *A Note from Darlena*

As we move into the final quarter of 2026, we want to thank you for your continued trust and support. It has been a privilege to work with you and be part of your business this year. Our team looks forward to finishing the year strong and helping you start 2027 organized, informed, and confident.

If you have any questions or need support, please reach out. We are always here to help!

*Darlena*



### WHAT WE NEED FROM YOU

To help us finish the year accurately, please keep our team informed of:

- Any changes to your business, ownership, or contact information
- New employees or changes in employee information
- Large purchases, financing, or loans
- Expected year-end expenses or income that may impact your taxes
- Any retirement contributions or other tax planning items
- If you anticipate needing a 1099 (see details on Page 2)



### WHAT OUR TEAM IS WORKING ON

- Keeping your bookkeeping up to date and reconciled
- Processing payroll and payroll tax filings
- Preparing financial reports to help you make informed business decisions
- Year-end planning and reviewing important deadlines
- Coordinating with your tax preparer as needed

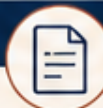


### SERVICES WE PROVIDE

Monthly Bookkeeping • Bookkeeping Cleanup • QuickBooks Setup • Payroll Services  
Financial Reporting • Tax Preparation\* • Fiduciary Services • Mobile Notary Services

\*Tax preparation provided in partnership with Hometown Tax.





## 1099 INFORMATION & W-9 REQUESTS

We will soon be preparing 1099 forms for 2026. If you are a vendor or contractor who has been paid \$600 or more during the year, you may receive a 1099.

To ensure we have accurate information, please provide a current W-9 form if you are a new vendor or if your information has changed.

If you are not sure whether you will receive a 1099, please reach out and we are happy to check for you.



## SMALL BUSINESS TIP RECONCILIATIONS MATTER

Regular bank and credit card reconciliations help ensure your financial records are accurate, reduce the risk of errors or fraud, and give you a clear picture of your business finances. Staying reconciled also makes tax season much easier and helps you make better business decisions.



## TAX SEASON PREPARATION

Now is a great time to start gathering important documents and information for your tax preparer. Keeping your records organized throughout the year can help make the process smoother and may help you take advantage of all available deductions.



## SHARE DFS & EARN A \$75 CREDIT!

Know another business owner who could use help with bookkeeping or payroll? Send them our way! When someone you refer becomes a DFS client and pays their first invoice, you'll receive a \$75 credit on your next bill.

Thank you for helping our small business grow!



## THE BEST COMPLIMENT IS A REFERRAL OR REVIEW

As a small business, word of mouth means more to us than you may realize. If you've been happy with the service you've received from DFS, we would be grateful if you would share your experience. Your review helps other local business owners find DFS and helps our small business continue to grow.



Leave a Google Review:

<https://g.page/r/CSJPYsollZdGEBM/review>



QuickBooks ProAdvisor Review:

<https://proadvisor.intuit.com/app/accountant/search?searchid=darlena-marcon>

*Thank you for your trust and support!*

