

Dear Client,

Our office is hoping that you have had a wonderful Christmas and Happy New Year. We want to thank you for your business this past year and look forward to doing business with you this coming year. Please call us if you need additional information or help.

Effective with this tax year, if you need an appointment, I will have individual tax appointments during tax season on Tuesday from 8 a.m. to 7 p.m., and Saturdays from 8 a.m. to 3 p.m. Each appointment will be for forty-five minutes, unless you request to make the appointment for longer. **Drop offs are welcome, if you do not have time for an appointment.** There is a mail slot in our door that comes directly into the building for your convenience after hours. **I will need to have a signed engagement letter to complete your return. (attached)**

This year a copy of your tax return will be on paper, unless you request a CD copy. The CD will be in PDF format. Each year, you will return your CD to me, and I will put the latest year on the CD along with copies of many of your tax documents such as W2s.

Tax returns will again be filed and taxes paid electronically whenever possible. You will review your return, and **the return will be electronically filed when we receive the completed authorization and payment in full for the return.**

This year we will send you an organizer if you call us.

Please provide us with the following additional information:

- Form(s) W-2 (wages, etc.)
- Form(s) 1099 (interest, dividends, etc.)
- Schedule(s) K-1 (income/loss from partnerships, S corporations, etc.)
- Form(s) 1098 (mortgage interest) and property tax statements
- Brokerage statements from stock, bond or other investment transactions
- Closing statements pertaining to real estate transactions
- All other supporting documents (schedules, checkbooks, etc.)
- Any tax notices received from the IRS or other taxing authorities

Sincerely,

Dean D Vohs, CPA