



Dear Friends,

We are excited to see all of you again this year. Thank you for your continued confidence in our firm. Below, please find some helpful information about our tax preparation process. Please read the information carefully and let us know if you have any questions.

Our goal is to prepare your tax return in a professional manner while working with you to produce the lowest possible tax despite the current complexity of tax laws.

Please complete the enclosed organizer and return it to us with all original W-2(s), 1099(s), and 1098(s). Your tax return is prepared from the information supplied by you. You will also need to verify all personal information in the organizer including date(s) of birth, address, email address and bank information. **If your bank information has changed, please contact us regarding the updated information.**

We will not begin preparation of your tax return until you have supplied all of your information. **In order to have your tax return prepared by April 15th, we must receive all of your information by March 31st. If this is not possible, you will be required to file an extension at an additional charge.**

Filing an extension with the IRS only provides an extension for the time to file your return – not for the payment of tax. If you anticipate needing an extension, please notify us in writing or via email and we will file an extension on your behalf. In order for us to prepare your extension, you will need to provide us with all of the available information necessary to prepare a reasonable estimate of your 2021 tax liability.

Once your tax return is prepared, it will be reviewed by a tax partner. All tax returns go through a thorough quality control process before being prepared for your review. Your return should be ready for your review approximately two weeks after we receive your information.

Your tax return will not be filed with the IRS until we receive your signed Form 8879.

If payment is due with your return, you still have the option of waiting until April 15th to pay, even if your return is completed and filed prior to that date.

New this year, we will be utilizing **SafeSend Returns** – a user-friendly and highly secure technology solution that allows you to manage your tax returns from the convenience of a computer, smartphone, or tablet. You will be able to e-sign your e-file authorization forms, receive estimated tax reminders, and pay taxes and invoices. If you would like to receive your tax return via SafeSend, please let us know.

After filing a return, many people are concerned about the possibility of being audited by the IRS. It can be a trying and expensive experience. We offer a Prepaid IRS Audit Fee Program to help relieve the anxiety of being selected for audit. For more information, please see the back of this letter.

Please contact us with any questions. We look forward to working with you again and for many years to come.

Casey Campbell, CPA
Kathy Howlett, CPA
Kylie Lindsey, CPA

Susan Harris, CPA
Sharon James, CPA
Larry Carrell, CPA
Debbie Russell, CPA

Matt Holmquist
Hanh Tong
Cara Sommer
Gail Biere