

# JAMES E. GEORGE, CPA

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January 11, 2019

To our Valued Clients:

The year has flown by and it is, once again, tax season. We look forward to seeing you and we will strive to make your tax preparation as easy as possible for you. To that end, please take some time to review the attached documents and fill out the requested information. This benefits both of us and saves time as we prepare your taxes.

You may drop off your information without an appointment however there may not be a tax professional available to address any questions you may have. If you have questions and would like to meet with a tax professional when submitting your information, please call to schedule an appointment.

Enclosed is a "How to Organize your Tax Information" sheet. Refer to it when compiling your tax information. Please complete the enclosed "Tax Questionnaire" and sign the "Engagement Letter" when submitting your information. We cannot start your returns until they are completed.

Due to the increase in identity theft and fraudulent tax return filings, we have increased security measures to safeguard your information and identities. Be prepared to provide a copy of your Driver's License this year.

For tax season 2018, we are adjusting our tax preparation fees to more accurately reflect the time involved and value of our services. The new tax laws require us to fill out extensive checklists that were not required in previous years, especially if you are claiming children as dependents. More forms and worksheets will be necessary, which increases the time required to complete your return. As always, we will strive to minimize your costs while providing you the best service possible.

We can give you a "Tax Organizer," which is a helpful checklist of the income and deductions reported on your 2017 income tax returns. You may pick up your Tax Organizer at our office. Clients outside of our local area can have their organizer posted to our web-based Portal. If you are unfamiliar with our Portal, it is a secured file transfer location on our website. This allows you to get your organizer and tax returns without having to come to the office. Our commitment to safeguarding your information limits our ability to mail tax organizers.

Our firm has prospered this past year largely due to your kind words and referrals. We thank you, our dedicated clients, for your continued support, and look forward to serving you.

Sincerely,

James E. George, CPA

*"Caring about your business is my business"*