Greetings,

From our family to yours, Happy New Year! We hope you had a great 2023 and look forward to working with you this year. Once again, its officially tax filing season. As each new year brings new tax law changes, we remain committed to keeping you informed so we can navigate through these changes for tax compliance and filing efficiency. Please visit our website for more detailed information on specific 2024 tax law changes for individuals and businesses.

NEW ONLINE CLIENT PORTALS. As we expand our level of service and technology, you now have access to a secure online client portal. The client portal allows us to share documents securely, obtain electronic signatures on tax documents, view and access final returns, pay invoices, and much more. While not mandatory, we encourage all of our clients to take advantage of the benefits of establishing a client portal.

To register for the client portal, you will need to access the secure link from our email invitation. Some of you may have already seen the email invitation. If you cannot locate the email invitation or would like us to resend it, please call or email Tracy at (440) 886-0400 or tracy.sharp@vavrocpa.com

For this tax filing season, we have implemented the following options for getting your tax information to us:

1. APPOINTMENT: We are available for meetings to drop off your tax documents
2. MAIL: You may use a mail service to send us your tax documents
3. DROP-OFF: You may drop off your tax documents during regular business hours at our office.
4. CLIENT PORTAL: After establishing a client portal, you can securely upload your tax documents. Once you have finished uploading all of your tax documents, please send us an email so we know to start processing your return.

As always, we require everyone to complete a client information sheet prior to the preparation of your 2023 tax return. The client information sheet provides us with updated information on contact information, driver's license numbers, direct deposit information, and delivery options.

Please check to see if you have all your tax documents (W-2's, 1099's, K-1's, etc.) before submitting for processing. The enclosed checklist can be used as a guideline to determine the various items and forms that you will need to complete your tax return. A review of your check register may also remind you of specific items that might otherwise be overlooked.

If there are any items that you wish to discuss further, please call us directly at (440) 886-0400. We look forward to continuing our relationship and hope you have a healthy and prosperous 2024.

Very truly yours,

Andrew Vavro, CFP®