

Greetings,

From our family to yours, Happy New Year! We hope 2024 was a great year for you and your family. Once again, tax filing season is almost here. As each new year brings new tax law changes, we remain dedicated to providing you the resources you need to ensure tax compliance and filing efficiency. Please visit our website for updated tax law changes, client information sheets, and income tax checklists.

We still require everyone to complete a client information sheet prior to the preparation of your 2024 tax return. The client information sheet provides us with updated information for phone numbers, address changes, driver's license numbers, direct deposit information, delivery options, and other filing changes.

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

- APPOINTMENT: We are available for meetings to drop off your tax documents
- MAIL: You may use a mail service to send us your tax documents
- DROP-OFF: You may drop off your tax documents during regular business hours
- CLIENT PORTAL: After establishing a client portal, you can securely upload your tax documents. **Please do not upload until you have ALL your tax documents ready.**

Please check to see if you have all your tax documents (W-2's, 1099's, K-1's, etc.) before submitting for processing. A review of your check register may also remind you of specific items that might otherwise be overlooked.

If there are any items 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 2025.