



AUERR, ZAJAC & ASSOCIATES, LLP
Certified Public Accountants

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Dear Client,

If applicable, your tax appointment card is enclosed in this mailing. Please note any address changes on the bottom of the card before mailing it back to confirm your appointment. Please include your current phone number and email address when sending in your tax information or when you come in for your appointment so that we can contact you if we have any questions.

If you are the victim of identity theft, please remember to bring your **six (6) digit IP Pin number you get in the mail** from the IRS with you when you come for your appointment (or if you mail in your documents, please include a copy of the letter with your tax documentation). Your return will be rejected if we do not have this IP Pin number. Use our website to keep up to date with any new scams that the IRS has uncovered. **Keep in mind, the IRS will only contact you via mail.**

We will be publishing your tax return in your CCH Portal if you are set up with one. You can also send your CPA any important tax documents and/or QuickBooks files through this Portal. The drop box can be found on our website **AZALLP.COM** under File Sharing. (You will need to request a printed copy if you want your return in that form). We also have another secured link called ShareSafe which can be used for uploading documents if you do not have a Portal. This can be found on our website as well. **You have the final responsibility for your tax return, therefore, you should carefully review it before you sign and approve the return. If you receive your copy of your return electronically, via CCH Portal, it will be saved here for three years. It is your responsibility to save the file to your computer if you want to keep for a longer amount of time.**

Please note, if you owe money to the IRS or any states and you have elected to have the money directly withdrawn from your bank account, it is your responsibility to make sure funds are actually withdrawn. If it does not show up on your bank statement, please make sure to make alternate arrangements to pay your tax bill.

Lou Kline, Registered Representative of Lincoln Financial Advisors, Inc. continues to be our strategic partner for financial planning and investments. We have included an additional page in this mailing in the hopes that you will take advantage of the beneficial services they have to offer.

There are currently changes being proposed to the tax code at the political level. At this time, there are no official changes to the current tax code. Any future changes to the tax code will not affect the current tax year and we respectfully ask that any discussions or questions related to these changes wait until after this tax season when we, as a Firm, have the time and resources to properly evaluate how these changes will affect us and our clients. We ask for your understanding and patience as we will not be able to address any of these pending issues until they are actually put into law, and we have the opportunity to properly educate ourselves to be in the appropriate position for tax planning as opposed to speculation.

Thank you for your continued business and we look forward to helping you this tax season.

Sincerely,

Auerr, Zajac & Associates, LLP

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