AUERR, ZAJAC & ASSOCIATES, LLP

Certified Public Accountants

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Dear Client,

Please join us in welcoming the newest member of our firm, Ethan Steeves, CPA.

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

In addition to the tax changes put in place for your 2019 tax filing, we have additional administrative matters that we as CPAs must adhere to. **Any client receiving a Child Tax Credit, Educational Credit or any Earned Income Credit must provide a copy of your dependent's Birth Certificate and/or Social Security Card to verify age and identity. (If you haven't done so already)** We understand that this is a burden for all, but it is required. We have also been notified that insurance forms from the Health Connector may be late. If you have received any assistance with your health insurance, please make sure to bring in Form 1095-A. If you have received assistance with your health insurance and you do not bring in the form, we cannot process your return.

If you are mailing in or transmitting your information through our portal for tax preparation, please do so no later than **March 20, 2020.** If you send information after this date, we cannot guarantee that your return will be timely filed by the April deadline. As in years past, you can transmit your CPA any important tax documents and/or QuickBooks files through your portal or our website at **AZALLP.COM** under File Sharing. In addition, our firm will do everything we can to complete dependent returns as quickly as possible, but we cannot promise that they will be completed at the time of the parent's appointment.

You have the final responsibility for your tax return, please carefully review it before you sign and approve the return. If you receive a copy of your return electronically, via the CCH Portal, it will be retained for three years. It is your responsibility to save any files to your computer if you choose to retain it for a longer amount of time.

Please note, if you owe money to the IRS, or any states and you have elected direct withdrawal from your bank account, **it is your responsibility to make sure the funds are actually withdrawn**. If the withdrawal does not reflect in your bank account, please make sure to make alternate arrangements to pay your taxes owed.

As the tax laws change, we are required to spend more time on each return to insure accuracy. This additional time means we find it necessary to have a modest fee increase for virtually all returns which will vary depending on the complexity of each return. We are hoping to keep this range within 5% on average.

Reminder: You can make a credit card payment for our tax preparation fees via our website. Click on "Bill Pay" and follow the prompts. (Make sure to include your Client ID#) We accept VISA, MasterCard and Discover. Please remember payment is expected promptly upon completion of services.

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 for your review.

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

Sincerely,

Auerr, Zajac & Associates, LLP