



AUERR, ZAJAC & ASSOCIATES, LLP
Certified Public Accountants

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Dear Client,

Prescheduled appointments, if applicable, are going out via automated phone calls or text the beginning of January 2024. Only call the office if you need to reschedule your assigned appointments.

*****PLEASE VISIT OUR WEBSITE, AZALLP.COM FOR ANY TAX FORMS OR HELP GUIDES*****

In addition to the tax changes put in place for your 2023 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 have not done so in prior years. We understand that this is a burden, but it is required. If you have received any assistance with your health insurance from the Health Connector, please make sure to bring in Form 1095-A, as we cannot process your return without this form.

If you normally mail or transmit your information through our portal for tax preparation, please do so as soon as possible, but no later than **March 20, 2024**. If you send information after this date, we **cannot guarantee** that your return will be filed by the April deadline. As in years past, you can transmit any important tax documents and/or QuickBooks files to your CPA 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and you have elected direct withdrawal from your bank account, it is your responsibility to make sure the funds are withdrawn. If the withdrawal does not reflect in your bank account, please make sure to make alternate arrangements to pay your taxes owed.

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.

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

Sincerely,

Auerr, Zajac & Associates, LLP