To My Clients and Friends

My little tax practice has grown tremendously over the last three years, and I wanted to thank all of you for your support, referrals, and patience as we’ve grown. I also wanted to make you aware of the changes and transition we are making to accommodate everyone and why they are necessary.

For those of you that I haven't had a chance to talk to in the last six months, there’s been a big change in my life personally. On April 14th, my ex-wife and mother of my two daughters, Patti Price Mousseau, passed away from breast cancer. My daughters (18 and 16 yrs old) have been dealing with it with amazing strength and grace and are doing as well as can be expected, but we always welcome prayers as we grieve and transition.

My daughters chose to stay in Arizona to finish out their remaining high school years where they are surrounded by a great support group of friends and family. So, to focus on them, I recently made the move to Goodyear, AZ and will live here full time for the near future.

Obviously, my personal priorities have changed dramatically, but my business priority this season is that none of you notice any changes or drop in the level of my services. I will work hard to make sure that KMTaxOC operations run smoothly and without interruption for any of your accounts.

Even though I have moved personally, I have renewed my lease at the Santa Ana office for the next two years and will still offer in-person appointments. However, these in-person appointments will be limited. In the last few years, we've all learned to be more technologically savvy; specifically, utilizing Dropbox for secure document sharing and Zoom for remote appointments. I am highly encouraging this use of technology for as many clients as possible. I’m only expecting to have around 200 in-person appointments available and would like to keep those open for clients that may not have the technological capabilities for a remote appointment.

Basically, I’m asking if you are at all capable of using Zoom please book a Zoom appointment; if you are not capable, then in-person appointments will be available but limited. I will have my self-booking on-line calendar up and running the first week of Jan 2022.

We also provide two ways to utilize our “Drop Off Service”. If you're not in a rush to get your return done, you may either:

1. Physically drop off your documents at our Santa Ana office either inside or after hours through our mail slot. OR
2. Upload all your documents to your personal on-line Dropbox in the 2021 Folder and text us when you have everything loaded.

Either way, when we complete the return, my staff will reach out to you for a phone call or zoom appointment with me to review, discuss, and finalize with you before E-Filing.

Finally, my priority for this tax season is the clients I already have – YOU! So, while referrals have always been greatly appreciated, I am suspending taking on any new clients.

I wish you and your families a wonderful and prosperous 2022. Merry Christmas, Happy Holidays, and Happy New Year! I look forward to seeing you soon!

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