



Elena C. Lavigne, CPA, LLC

Certified Public Accountant and Consultant

Welcome to Elena Lavigne CPA. We are delighted to have you as a new client. Our boutique firm specializes in small business accounting, financial coaching, tax planning and preparation, as well as notary services.

As we commence the new year, we are preparing for an efficient and successful tax season. To ensure your experience is seamless and to prevent any potential delays, please prepare the following documents:

- **Copy of a valid Driver's License or ID**
- **Previous Year's Tax Return**
- **Completed Engagement Letter/New Client Data Sheet**
- **Bank Account and Routing Numbers** (Direct deposit is the quickest and safest method to receive your refund, avoiding any issues with lost, stolen, or undeliverable checks)
- **Tax Preparation Deposit** (\$200 Individual/\$600 Business)
 - Individual Returns (1040) \$200-May include small business schedule C
 - Business Returns (1120, 1120S, 1065) \$600- if you are unsure if this applies to your business, please reach out to the office for further explanation.
- **All Year-End Income Documents:**
 - Forms W-2 from all employers during the tax year
 - Forms 1099 from banks and other payers (unemployment compensation, dividends, retirement plans)
 - Form 1099-NEC for any freelance or side job income
 - Form 1095-A, Health Insurance Marketplace Statement, for reconciling advance payments or claiming the premium tax credit

We offer flexibility in document submission:

- **In-person drop-off** at our office
- **Secure online upload** via our client portal, Taxdome. Please contact our office at (225) 243-5860 to set up this service.

Our team is committed to efficiency and will reach out if we have specific questions once we begin your tax preparation.

Thank you for trusting us with your tax and financial needs. We look forward to serving you and welcome you to the Elena Lavigne family.

Warm regards,

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