

# We don't believe tax time has to be boring – so let's play **PLINKO!**

We want to continue celebrating our awesome clients! Last year, many of you won hundreds of dollars in return discounts, gift cards, wine and more.

This year you will once again be earning a chance to play the beloved Price Is Right™ Game – **Plinko!**



**How do you get a chance to win?** It's simple. Fill out the *Intake Form* and signed Engagement Letter and submit it with your complete set of tax documents. Then, you get yourself a Plinko Chip to try to win! This year you can win money off tax returns, wine, scratch off cards and more!

We are firm believers that our relationship is built from mutual respect and teamwork. In that light, we aim to tweak our processes each year to improve our service level based on the prior year's learnings. This year you will note a revised Client Intake Form in your Welcome Packets. Our goal is to jump right in preparing your return when you drop off and to **minimize the back and forth making for less interruptions to your day!** *To that end, we will begin to work on returns only when all materials including the Client Intake Form and Engagement Letter have been received.*

Our aim is to be able to deep dive into the return from the onset of your drop off and then you will be hearing from our team once we have the return essentially complete/ if we need to dig deeper on certain things to maximize write-offs. Other than this, the process is same as usual, we'll schedule a review & signature meeting, whether on zoom, phone or in-person & send things off to the IRS and states for you.

As always, we are available if you have questions as you are gathering your materials. We look forward to hearing from you to get your appointments scheduled.

We can't wait to see what you win this year!