



Counting House Technics, LLC

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Instructions to Taxpayers:

On behalf of all of us, thank you for allowing us to serve you in this annual responsibility.

Our goal is to make tax filing as simple as possible in spite of expanding government regulation. The IRS is understaffed and overwhelmed. Cybersecurity concerns have increased our identity theft precautions. Secure File Pro provides us with the highest level of secure communications. It is a portal for sending and receiving tax information using the latest technology.

On the following pages, you will find our annual Engagement Letter, Privacy Policy, Use Agreement and Client Organizer. Be sure to sign and date the Engagement Letter & Use Agreement. According to current Federal regulations, we must have a signed copy of this letter BEFORE we can prepare your return.

Please forward the Organizer to us with your tax information. If you can fill this in online & forward it, fantastic! Using your own well-organized worksheets are usually fine but MUST be signed and dated before we can accept them for use on your tax return.

We accept tax information a variety of ways: You may hand-deliver, mail, scan to email or fax to us, along with copies of all your tax statements and other tax related items. Uploading forms through Secure File Pro (your Client Portal) is the most secure way to send us the information. Email us for instructions.

We have several worksheets, in addition, for various Business and Farming Schedules.

Send email to contact@chttax.com. Use "Current Year Tax Info" for the subject line.

Thank you!

Denise Burkhart, AFPS