

DAY _____ DATE _____ TIME _____

December 2017

Dear Clients and Friends,

I hope this holiday note finds you healthy and pray that you are doing well!

I have prescheduled your 2018 appointment near the same time as last year unless you requested a different time. Some will just be a “drop off” or a “call for an appt”. You are welcome to change your appointment if it isn’t convenient. Saturday’s book up early so call to change as soon as possible. Marina will be confirming **ALL** appointments a few days ahead of your scheduled time.

As in previous years, please drop off, email or fax your tax information 1-2 weeks prior to your scheduled appointment. This has really alleviated the various trips to the office if you are missing information. Last year’s tax return is a great resource for what to bring in this year. It is very important that you are prepared when you drop off. This helps to keep me efficient so I prepare an accurate return and keep costs down. If you need a more detailed organizer, let me know and I will email one to you!

Please sign the **buff colored** “permission slip” that I have included in this letter. It is very important that they are signed by both of you if you are filing a joint return.

Holiday Blessings & Happy New Year!!!

Sincerely,

Lauren King, EA

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