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Dear Client,

We wish you a happy, healthy and prosperous New Year.

Enclosed is the 2018 tax organizer and helpful instructions to guide you in gathering the necessary information in order for us to prepare your tax return. Kindly read through the pages and confirm and update your current contact information in the organizer. This makes it easier for us to reach you if we have any questions.

Please sign the engagement letter where indicated and return it to us with your data in order to ensure an understanding of our mutual responsibilities. Please do this even if you do not use the complete organizer in gathering your tax information. Signed engagement letters are requested prior to our preparing your returns, however sending us your tax data will imply agreement with the terms of our engagement.

If you would like to email us your tax files via Citrix Sharefile, just email us at admin@actcpa.com and we will send you a Sharefile link.

The filing deadline for the tax returns is Monday, April 15th. In order to meet this filing deadline, and not go on extension, the information needed to complete your returns should be received in this office *no later than March 30, 2019*. Our objective is to minimize extensions. Complete and accurate submission of your tax data is important. Therefore, all returns received AFTER March 30th, or those with incomplete information as of that date, will be placed on extension in order for us to have the time to prepare a complete and accurate tax return for you. If any extensions are required, an estimate of tax due will be calculated for you and must be paid with the extension in order to avoid interest and penalties. The extension will then provide you additional time to gather your information. The deadline for tax filing with the extension is October 15, 2019.

I am always thankful for great clients like you. Our business is growing because of referrals from clients like you. I appreciate every referral and pledge to deliver the very best in service.

We want to express our appreciation for the opportunity to work with you, not only at tax time, but also throughout the year. If you have any questions, please contact us.

Sincerely,

Cristina Andreana, CPA
ACT Financial and Tax Services, LLC