



TAX APPOINTMENT – *Date:* _____ *Time:* _____ *With:* _____

Hi there!,

Welcome to 2016! Our team has met with many of you this past year, as we've worked to 'help you become financially stronger, so you can focus on what truly matters in life'. We're looking forward to another strong year ahead, including the smooth filing of your taxes. The pointers below will help us coordinate with each other, and don't hesitate to contact us if you have any questions along the way!

- **Christine joins Elements:** We're excited to announce a new member of our team! – Christine L. Fleming is a CPA experienced in tax and accounting, and she'll be meeting with some folks this year, as well as providing support throughout the year. Check out our website or Facebook page for an introduction: www.elementscpa.com/who-we-are
- **Getting ready:** Enclosed is a *Pre-appointment Checklist* for you to run through before your tax interview, to be sure you have everything gathered, and to note any questions you want to ask. Having everything ready helps us keep your return on track.
- **Your Value Pak:** If you haven't already chosen your Value Pak for this year, simply see the enclosed pre-priced options to make your selection, or look for a separate contact from us.
- **Your appointment:** Your appointment is noted above, and also on the outside of your envelope – don't forget to add to your calendar, and give Sharnice a call if you need a different date/time.
- **The steps:** Your tax return will follow our specially designed path from start to finish – check out the graphic with this letter to see an overview of the steps, and track your return to completion.
- **The cut-off:** Your tax interview will need to be completed, and the last piece of tax information received, by March 31, to enable us to file your return by April 15.
- **Extensions:** If you've chosen either Active or Support Value Paks, we'll automatically file extensions for you if you need them. And if you've chosen a different Value Pak, simply complete the Change Request form on our website by midnight before the due date, and we'll take care of it for you.
- **2015 tax updates:** Curious to learn about tips and some of the tax law changes for this year? – just head on over to our blog at www.elementscpa.com/blog.

Christine, Virginia, Sharnice, and myself look forward to helping you file your tax returns as smoothly as possible, and don't hesitate to reach out to us with any questions – we're here to help!

Sincerely,
Adrian G. Simmons
& the Elements CPA team