

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

Welcome to 2018! We hope it's off to a good start – I always like to look at a new year as being open to possibilities, and to approach with fresh eyes and energy.

Of course, another part of kicking off the new year, is getting taxes out of the way – the pointers below will help make it a smooth process, and don't hesitate to contact us if you have any questions.

- **Be prepared:** Enclosed is the *Pre-Appointment Checklist* – be sure to scan through both before your tax interview to be sure you have everything, and to note any questions you want to ask. And you can go digital by simply saving PDF's to the "Your Uploads" folder in your secure e-Cabinet (<http://e-cpa.com/2h0Ji0N>).
- **Choose your Value Pak:** If you haven't already chosen your Value Pak for this year, be sure to check your e-Cabinet before your appointment, so you'll be ready to select your choice (<http://e-cpa.com/2h0Ji0N>)
- **Appointment day:** Don't forget to add the above appointment to your calendar, and give Sharnice a call if you need a different date/time.
- **Cut-off dates:** For *Partnerships* and *S-Corporations*, we'll need the last piece of information and complete your tax interview before Feb 28, to ensure your return will be ready by Mar 15. For *C-Corporations*, we'll need both by Mar 31 to ensure completion by Apr 15. And for *Exempt Organizations*, we'll need both by Apr 30 to meet the May 15 deadline. (For some returns, we may employ a tax extension strategy as part of your broader tax plan.)
- **Extensions:** Active or Support level members will automatically have extensions filed for you if needed. And if you've chosen a different Value Pak level, simply complete the Change Request form on our website by midnight before the due date, and we'll take care of it for you.

We're excited to welcome the newest member of our team who joined us in November, and who you'll have an opportunity to meet this tax season if you haven't already – her name is Rachel Andujar, CPA and she'll be stepping into the role of Tax & Accounting Designer here. She comes from the world of tax, and you can checkout her introduction video on our YouTube channel at <http://e-cpa.com/2l14rjP>.

Rachel, Sharnice, and myself look forward to helping you file your tax returns as smoothly as possible this year, 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