Financial strength, for what matters.™

elementsCPA

TAX APPOINTMENT – *Day:* _______ *Date:* _______ *Time:* _______ *With:*_______

*Hi there,*

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* and your personal *Tax Document 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 (link above), so you'll be ready to select your choice.

- Appointment day: Be sure to add the above appointment to your calendar, or give Sharnice a call if you need a different date/time.

- Mar 30 cut-off: We'll need to receive the last piece of information and complete your tax interview before March 30, to ensure your return will be ready by April 15. (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.

- 2018 Tax Law Change: You've probably heard a lot about the big tax law change that happened last month. There's effectively no impact on 2017 returns, but you can visit our Insights Blog or Twitter feed for a recap of key considerations that affect 2018.

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/2Il4rjP.

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*