

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

Hi there,

Welcome to 2019! 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. Plus go digital by saving PDF's to the "Upload Files Here" 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. (available by Jan 31)
- **Appointment day:** Be sure to add the above appointment to your calendar, or give Sharnice a call if you need a different date/time. (Early contact makes rescheduling much easier.)
- **Mar 29 cut-off:** We'll need to receive the last piece of information and complete your tax interview before March 29, 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 level, simply submit an Extension Request our website by midnight before the due date, and we'll take care of it for you.
- **2018 Tax Law Change:** There's a slew of changes that will affect this year's tax preparation season – we've been tracking all the latest and have run tax projections for many of you too. Our goal is to make the changes as smooth as possible on your end, but there may be complications that will take extra attention depending on your particulars. Be sure to visit our Insights Blog and Twitter feed for many helpful highlights.

We're excited to welcome the newest member of our team, Michael McIlhargey CPA, who joins as a Tax & Accounting Designer – he's comes from a background working in tax with business and individuals, and is a fan of technology too.

Michael, 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 – our team is here to help!

Sincerely,
Adrian G. Simmons
& the Elements CPA team