

January 20, 2017

Dear Valued Client,

Happy New Year! I wish you and your family a healthy and prosperous 2017.

It is time to start thinking about your 2016 income tax preparation. Kindly send me your income tax information at the earliest date possible to give me adequate time to carefully prepare, review and process your income tax returns for the tax year ending December 31, 2016. This will make certain that you have sufficient time to review these forms and related schedules before I release them to the various tax authorities by way of our electronic filing system. Please note, that if I do not receive your complete personal tax information by March 15, 2017 your tax returns may have to be extended.

I have included several enclosures this year to assist you with your tax planning. There is a tax document checklist to use as a guide in gathering your tax information, as well as the Consumer Bill of Rights Regarding Tax Preparers, which is a disclosure mandated by NYS. I have also prepared our annual tax update memo for your review.

For your convenience and to save you time, I continue to accept your annual tax materials by fax, e-mail, mail or courier service. If you opt to mail your forms to us, please be sure to send us **copies** of your tax documents and retain the originals for your files. As a reminder, we will no longer be returning original documents. If you send original documents, we will retain all original documents in our archives.

Please be sure to include all updates to your contact and personal information when submitting your tax paperwork: change in address, phone number, e-mail address, marital status, dependents, etc. These circumstances can change all throughout the year, and are so often overlooked at tax time. **Also, we are now required by the IRS to obtain copies of your driver's license and social security card. Please be sure to send those as well.**

If you prefer to meet with me to discuss your tax returns or any other financial concerns, feel free to call for an appointment. I suggest you contact me as soon as you are able so you can have more options with respect to my calendar availability.

I look forward to hearing from you soon.

Sincerely,

Kevin J. Zulch