



## 2017 Tax Return Preparation

### PLEASE READ

Dear **Client**:

It is time to prepare your **2017** tax returns.

**Tax Organizers:** We have prepared and uploaded your **2017** tax organizer to your client portal to help you gather the documents and other information needed to prepare your tax returns. We have preprinted certain information from your **2016** return in the organizer to help you in completing it with a minimal amount of time and effort. You can either fill in the **2017** columns of the organizer, or use it as a guide in compiling the information needed for your **2017** returns, whichever method suits you best. If you did not receive a tax organizer and you want one, please call our office.

**Please be sure to include the following documents when you send in your information:**

- 1. Signed Engagement Letter - Mandatory - We cannot start your return without it!**
- 2. Tax Questions - Mandatory - We are searching for deductions!**

**Delivery of Tax Information:** There are three ways to deliver your tax information to us.

- 1. Client Portals:** Your information may be received via the web using your secure client portal. You will receive separate email with instructions to access your portal. You can also access your portal through our website at [www.CastleRockCPAs.com](http://www.CastleRockCPAs.com) under the “Client Login” tab. We will receive an email once your information has been uploaded.
- 2. Mail or Drop off:** If you are comfortable mailing in or dropping off your tax information, you may do so without an appointment.
- 3. Appointments and “New” Client Scheduler:** We are happy to announce our new client scheduler that can be accessed through our website under the “Scheduling” tab. The scheduler will allow you to receive text and email appointment reminders. **Appointments are limited and we anticipate they will fill up early this year.** Standard tax appointments are scheduled for 30 minutes. If you don’t want to use our online scheduler, please call the office and we can help you as usual.

For your convenience effective **January 2nd**, our office hours during tax season will be as follows:

Monday thru Friday	8 am - 5 pm (Closed for lunch from 12-1)
Saturday	9 am - 12pm (by appointment only)

If you have any questions or if we can be of assistance in any way, please do not hesitate to call.

Very truly yours,

**The McKillip Group, Inc.**