The McKillip Group
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2018 Tax Return Preparation

PLEASE READ

Dear Client:

It is time to prepare your 2018 tax returns. With the biggest tax law changes in over 20 years, we expect this to be an exciting, yet challenging year! We have taken hours upon hours of continuing education, hired new staff and are ready to tackle your tax returns. For some of our clients, tax laws have become simpler, for others, especially those with businesses, they have become more complicated. We are asking you in advance for you patients with us as we navigate the new tax laws and multiple new tax forms. Like other firms, we are anticipating that tax returns will take a little longer this year than in previous years.

Important for 2018: Accumulate your tax information in an orderly manner and submit the information as early as possible. Tax returns will be prepared on a first in first out basis.
We do our best to get your tax return done as quickly and accurately as possible. All your tax information must be received to be counted as received. If you are missing information, it will delay the preparation of your tax return. If you are missing one piece of information (like a K-1), we would encourage you to submit the information without the missing information and get it to us as soon as you receive it. If you are missing more than one piece of information, please wait to submit all of it together.

Tax Organizer: We have prepared and uploaded your 2018 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 2017 return in the organizer to help you in completing it with a minimal amount of time and effort. You can either fill in the 2018 columns of the organizer or use it as a guide in compiling the information needed for your 2018 returns, whichever method suits you best. If you did not receive a tax organizer and you want one, please call our office.

Documents: We have included a list of the documents needed. Due to the amount of time spent gathering and organizing clients tax documents, we respectfully request that you use the following guidelines when submitting your information in an orderly manner:

1. Use the organizer as a guide to make sure you are not missing any information.
2. Fill out the questionnaire to help identify deductions and missing information. (Mandatory)
3. Submit your documents through your client portal if possible.
    a. Scan documents as one pdf file if possible. (Do not scan as separate pdf files and upload separately.)
    b. If you are not a computer person, can't scan or use client portals, we will not hold it against you.
4. **We prefer summaries vs actual receipts.**
5. **Remove all staples and paper clips.**
6. **Please take all your documents out of the envelopes.**

Note: We would rather spend time on your tax return trying to save you tax dollars than doing administrative work.

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 can access your portal through our website at www.CastleRockCPAs.com under the "Client Login" tab. We will receive an email once your information has been uploaded.
   Portal Instructions:
   a. **Enter your username and password** and click the "Sign In" button. If you do not know your login or have forgot your password, let us know and we will send you a password reset.

   To download a document from your preparer:
   b. When the home page displays, notice the My Folder menu to the left.
   c. Click Documents from Preparer.
   d. In the right window, your documents should appear. Click the Download link for a document.
   e. Select to open or save the file.
   f. If you select Save, follow the normal procedure for saving a file to your computer.

   To submit a document to your preparer:
   g. Click the Documents to Preparer link under the My Folder section.
   h. In the right window, click the Upload link.
   i. Click the Select button to search for the file you would like to upload.
   j. The file should display under the button. Click the Upload button.
   k. The file will display in the right window. You have the opportunity at this time to rename or delete the file if necessary.
   l. Once the file has been uploaded, your preparer will be notified that a file is ready to be downloaded on our end.
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/Client Scheduler: Appointments are limited, and we anticipate they will fill up early this year.** Standard tax appointments are scheduled for 30 minutes. Please schedule appointments on our website under the "Scheduling" tab. The scheduler will allow you to receive text and email appointment remainders. 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.