



2021 Tax Return Preparation

PLEASE READ

Dear **Client**:

We hope you are doing well! **It is time to prepare your 2021 tax returns.**

New This Year:

We have Moved! Our new location: **3740 Dacoro Lane, Suite 150, Castle Rock, CO 80109** (by the movie theater).

Tax Organizers are Back: We have prepared and uploaded your **2021** tax organizer to your client portal to help you gather the documents and other information needed to prepare your tax returns. If you did not receive a tax organizer and you want one, please call our office.

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

1. **Client Portals:** **We are back to our old 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.
2. **Appointments:** Standard tax appointments are scheduled for 30 minutes. Please schedule appointments on our website at www.CastleRockCPAs.com under the “Scheduling” tab or call the office.
3. **Mail In or Drop Off:** If you are comfortable mailing in or dropping off your tax information, you may do so without an appointment. We will scan and return all documents to you.

Please 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. If you are missing information, it will delay the preparation of your tax return. Please submit all your information at once if possible.

Document Organization: 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 organize your documents and make sure there is no missing information. If you are only missing a K-1, we would encourage you to submit the information without it.
2. We prefer summaries vs actual receipts.
3. Remove all staples and paper clips.

4. Please take all your documents out of the envelopes.

Please be sure to include the following documents when you send in your information: These documents are mandatory. We cannot start your return without them!

1. Signed Engagement Letter
2. Tax Questionnaire- With the tax law changes, **we need to know if you received the 3rd stimulus payment or advance child tax credits.** We are also searching for deductions!

For your convenience effective [February 1st](#), our office hours during tax season will be as follows:

Monday - 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,

Jodi A. McKillip, C.P.A.
The McKillip Group, Inc.