

January 5,2023

Dear Client,

We hope this letter finds you well! Tax time is upon us!

We want to introduce to you a new member of our team, John Mourer, CPA. John has partnered with us to meet the needs of clients filing individual returns. We are excited to have him and know that his expertise will enable us to serve you this tax season with more efficiency. John's e-mail address is johnmourercpa@gmail.com

Enclosed you will find a tax appointment checklist, client information sheet, and engagement letter to help get your 2022 tax returns organized. We have multiple ways for you to deliver your documents.

1. You can drop all your documents at the office.
2. You can mail all of your tax documents by Priority Mail to 3313 Chili Avenue Suite B Rochester, NY 14624. We will call you once we receive the documents.
3. You can use our secure portal system - Share File. If you would like to use this option, please send an email to Dario@roctaxandaccounting.com. We can reactivate your account or set a new one up for you. If you need help, please call 585-571-4545.

Please follow the TY 2022 Tax Appointment Checklist. We **MUST have** the information on the checklist:

- * We need a signed Engagement Letter and your Client Information Sheet.
- * We need an updated copy of a voided check for our records.
- * Include a photocopy of your driver's license (Front & Back) with your tax information as it is a mandatory requirement for filing your tax return. If you file jointly, we will need both spouses' licenses.
- * If you have cryptocurrency, foreign bank accounts, or own part of a business outside the USA you **MUST** let us know, you will need to include an 8949 for all of the transactions.
- * **Do not email any personal private identifiable information such as social security numbers and bank account numbers that could be used to compromise your identity.**

When completed, we will contact you to make arrangements for you to sign your tax return(s). You will be able to come into the office to pick up your return, have them mailed to you, or sent to you via ShareFile and signed by you electronically.

In order to insure that we meet the individual filing deadline, we must receive all of your information by March 15th, 2023. If you are not able to provide us with all of your tax information by March 31st, 2023 we will be able to assist you in preparing an extension request. If you want us to file an extension and we receive the information after April 1st, 2023, there will be a fee of \$95.00 to file the extension, (prior to April 1st, 2023, there is no fee). If we mail your completed tax return and tax documents to you, we will charge a priority mail fee of \$15.00 so that we can track the package.

Kindest regards,

Deborah D. Tregea, EA
John Mourer, CPA