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January 15, 2017

Dear Client,

We are excited to be celebrating our 27th anniversary and wish to thank you for your business, confidence and support over the years. In addition, we thank you for the greatest compliment of referring your family and friends.

We would like to take this opportunity to remind you to please contact us **first** when considering to draw social security, as we have one of the best social security calculators on the market written by experts on the subject. We can then prepare a report to help you decide the best time to draw income from social security.

If you are considering rolling over your IRA or pension plan, we can do that while preparing your taxes. We would also be happy to meet with you to review your retirement accounts and your financial investments at no additional charge. Please include your investment statements and retirement accounts with your tax information packet.

With a new President coming to office, we can expect several tax changes to occur. We are once again making our tax organizers available to anyone who requests one. If you have not used one in the past, please email Cathy to request one for 2016, as it is our attempt to be as thorough as possible in the preparation of your return. If you received an organizer last year, we will email this year's organizer to the same address.

All Americans have been affected in some manner by the Affordable Care Act from 2010 (Some people call it Obamacare). One of the requirements is that all taxpayers must be covered by health insurance or pay a penalty, and this is proven through the release of Form 1095. If you received a Form 1095 from any issuer or agency, we MUST have all copies to prepare your tax return.

IF YOU ARE CLAIMING NONCASH CONTRIBUTIONS, PLEASE MAKE SURE THERE IS AN ADDRESS AND DOLLAR AMOUNT ON EACH SLIP. IF NOT, THEN IT WILL NOT BE INCLUDED ON YOUR RETURN.

When organizing your paperwork, please be sure to separate all government forms from your own notes. Government forms are W-2, W-2G, 1098-Mortgage, 1099-B, 1099-G, 1099-DIV, 1099-INT, 1099-R, 1099-SSA, Schedule K-1 (1065), Schedule K-1 (1120-S), Schedule K-1 (1041). Please paper clip the government forms together. DO NOT STAPLE. Please make sure that you take all forms OUT OF the envelopes.

We ask that when you are getting your information to us for your 2016 Federal tax return that you set an appointment for an after-tax season "Tax Tune Up" to examine tax and estate planning strategies. If your income is over $200,000, it is almost mandatory that we meet for future tax planning because of surtaxes.

There are literally hundreds of other changes, extensions and deletions that we will consider this year while preparing your return. Because of these changes, we are requesting everyone to have their tax information to us no later than **March 24**, 2017. Please rest assured that we will utilize our best resources to once again provide you with timely, complete and accurate service while keeping your tax burden to the lowest legal amount.

If you wish to schedule an appointment prior to **March 22, 2017**, please email or call Cathy. Please be advised that there will be an additional fee for scheduled appointments.

We look forward to working with you once again in 2017 and please refer to our website for many helpful tools and additional information. Thank you again for your continued support.

Sincerely,

George S. Magas

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