

January 15, 2018

Dear Valued Client:

Happy New Year! Kirsch CPA Group appreciates your past business and wishes you a prosperous 2018. The news is filled with tax changes and identity theft. **Our priorities are to keep your information secure and to assist in minimizing your tax burden.**

It is important that you complete the entire enclosed checklist. This gives us the information needed to prepare your return and to take advantage of all available tax saving options.

Don't forget - REQUIRED INFORMATION!

Use the checklist to include the following required information:

1. Copy of driver's license or state identification for each tax payer.
2. Written confirmation of bank account numbers for direct deposit of a refund or direct withdrawal for payment. Enter the last 4 digits of your account # on the Kirsch checklist or send a voided check.
3. List the email address for each tax payer on your checklist.

The Process

1. Complete the attached checklist and collect your tax documents. (W-2, 1099, deductions, etc.)
2. Send your COMPLETED checklist and ALL tax documentation to us by March 21, 2018* to guarantee your return will be completed by April 17th. *Information received after this date may result in a rush fee.
3. We are offering 3 ways for you to provide us your tax documents.
 - Upload your documents to your secure portal (see Security)
 - Drop off your documents to our office in Fairfield or Oxford
 - Mail to the Fairfield office

Please note: If you provide us with the documents to prepare your tax return, you are accepting the terms of our enclosed Engagement Agreement.

Rest assured that we will utilize our best resources to provide you with timely, complete and accurate service. We look forward to our continued relationship with you.

Sincerely,
The Kirsch Team

Security

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We take the security of your personal information seriously. In today's world, mail and email are becoming less secure.

We invite you to use our secure portal to send your documents to us and to receive your tax return. The portal keeps your information safe and available any time you need it throughout the year. To get set up, call our office (513) 858-6040 or email info@kirschcpa.com. We will send you an email with the steps to log into our secure Client Center on our website, www.kirschcpa.com.

If you have any questions, please contact our office at (513) 858-6040.



Thank you for your continued business and referrals!

We are blessed with outstanding clients and a caring professional staff. It is truly a joy to grow relationships with our clients while helping them meet their goals.