



January 8, 2024

To our valued clients:

Hope that this letter finds you well in the New Year!

We invite you to see our expanded office and new reception area in Linwood. We opened the new office space in December. Please enter our office through the door marked "Reception" when you arrive.

The only constant in the world of taxes is that something is always changing. In 2023, we began to roll out our client portal. Our client portals are provided by an application called "Canopy". Canopy allows us to manage all aspects of our relationship with you including providing each client with a secure portal where you can log in to access current and prior year tax returns or tax information, you can upload your tax documents and you can even pay your bill. Canopy is a key component in our move to a paperless environment.

Occasionally, you may receive a Federal or state tax notice. These notices range from a simple information request to a change of a tax return. We are happy to assist in resolving any tax notices that you may receive. Our ask to assist you in resolving these notices is that you provide us with all pages of the notice. You are welcome to drop off the notice, upload it to your client portal, mail, fax, email or scan it to us with your phone. We cannot accept pictures of notices via text or email. We will ask that you sign a power of attorney covering the tax matter addressed in the notice. Finally, please note that New Jersey may take up to 90 days to respond to our response to the notice. Patience is the key to resolving all tax notice issues.

As you are aware, we regularly evaluate our fees. A change in the scope of our services will typically result in a fee adjustment. An example of a change in scope that would result in a fee adjustment would be the purchase or sale of a rental property. We are still working through the fee adjustments that we mentioned last year. Apart from a change in scope, you should not see year-over-year fee increases. Questions or concerns regarding fees should be directed to Doug Moini.

Reminders: To make an appointment, reach out to our receptionists, Roxanne, Penny, or Linda. For those we see in Egg Harbor City, please enter the office via the back door on Fifth Terrace. There is a sign indicating the entrance. For those we see in Linwood, please check in with Roxanne or Linda at the reception desk in Unit 8. Avoid the rush and drop off your tax information as early as possible. Please note the deadline to receive information is March 1st for businesses and April 1st for individuals. For returns received after these dates, we will be filing an extension. Finally, prior to filing your return, we require a signed 8879 and payment.

Thank you for your faith and trust in us. We appreciate the opportunity to serve and work with you. Questions and referrals are always welcome.

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