

1040 Organizer Welcome Letter

PLEASE READ

Dear Client:

It is time to prepare your 2022 tax returns.

Enclosed is your 2022 tax organizer to help you gather the documents and other information needed to prepare your tax returns. I have preprinted certain information from your 2021 return in the organizer to help you in completing it with a minimal amount of time and effort. You can either fill in the 2022 columns of the organizer or use it as a guide in compiling the information needed for your 2022 returns, whichever method suits you best. If you did not receive a tax organizer and you want one, please call our office.

Please be sure to include the following documents when you send in your information:

- 1. Information Checklist**
- 2. Consent For Use of Tax Return Information - Needed to provide you newsletters!**
- 3. Signed Engagement Letter - Mandatory - We cannot start your return without it!**
- 4. Questions Checklist - Mandatory - We are searching for deductions!**

For your convenience effective January 29, 2023, our office hours during tax season will be as follows:

Monday thru Friday	8 am - 6 pm
Saturday	9 am - 4 pm

If you have any questions or if we can be of assistance in any way, please do not hesitate to call.

Very truly yours,

CPA Advisory Group, Inc.