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Dear Client:

Happy 2017! Attached is your 2016 Tax Organizer. You MUST complete the **Miscellaneous Questions**, the rest of the Tax Organizer is OPTIONAL. Below is a list of the information we need back from you NO LATER than **March 20, 2017** (an additional fee may be charged if we receive your information after this date):

Information to send back to us:

1. There is no signature required on the Engagement Letter. By Returning the organizer to us and/or by providing us with the information to prepare your return, you agree to the terms of the engagement letter.
2. Miscellaneous Questions **(REQUIRED)**
3. Tax Organizer (Visit our website for organizer pages, if needed, for new items you have this year.)
4. Tax Documents-Originals **(PREFERRED)**, paper copies (please indicate if our copies to keep) or electronic format (Multiple emails/pdf's are time consuming on our end. So in an effort to keep your costs down, please send all information in one transmission.) **If you have broker statements, please include the entire statement with your originals.**

***Please do not use a highlighter on your documents - it comes out black when we scan**

5. **\$300 Deposit.** Many of our clients have asked for an easier way to pay their bill on line and we listened. You can now pay via ACH from your checking account. Simply visit our website at www.laccpa.net, click on "Pay Your Bill Online". You can also complete the "Payment Authorization Form" located under "Tax Return Documents" on our website and send to our office.
6. **If we will be preparing your children's return, go to our website and click on "Tax Return Documents"** to print an Engagement Letter and Dependent's Questionnaire or call our office
7. Visit our website at www.laccpa.net and click on "Tax Return Documents" to view our *Helpful Tips and Frequently Asked Questions* and *How the Affordable Care Act Impacts Your Taxes*.

Once we receive your information, we will email/call you to confirm receipt. We will follow up with additional questions pertaining to your return usually within 10 days.

After we complete your return, everything you need to finalize the tax return process will be sent to you in secure electronic format including your copy of the return (paper copies of your return will result in an additional \$25 fee). You are required to review the tax return and **sign/return to us Form 8879** (IRS E-File Signature Authorization) **before we can E-File your return.** We require any remaining tax preparation fees to be paid in full prior to E-Filing your return. Any original documents provided by you will be returned via US mail, unless you notify our office otherwise.

As always, we appreciate your business. Thank you for your help in completing these documents. Please contact us at (630) 961-9602 or barbs@laccpa.net if you need further assistance or wish to schedule an appointment.

Sincerely,



Leslie A. Cesario
Certified Public Accountant