

YOUR 2009 TAX ORGANIZER HAS ARRIVED

ATTENTION

For this year's tax season we will have the IRS E-File system available. Please indicate on your tax organizer if you would like us to file your tax return electronically. An additional form will need to be signed and returned to our office once your return is completed.

PLEASE VERIFY THE FOLLOWING ITEMS:

- Address
- For your privacy, we have suppressed printing your Social Security No. However, if you have been notified of changes or would like to verify our records, please let us know.
- Dependents
- Telephone No.
- Marital Status
- Birth Dates

(We must have the name and social security of all dependents!)

INCLUDE THE FOLLOWING FOR 2008:

- All W-2s
- All 1099s
- All brokerage statements
- All closing statements for sale or purchase of home
- How much & when you paid estimated taxes for both Federal and State estimates

(Please do not assume we will have the above information in house.)

APPOINTMENTS/PICKUPS/TURN-AROUND TIME DURING TAX SEASON

Office hours:

Tax Season: Mon.-Thurs. 8:00 am to 7:00 pm Summer: Mon. - Fri. 9:00 am to 5:30 pm
Friday 8:00 am to 6:00 pm
Saturday 10:00 am to 2:00 pm

Pickup during tax season:

Monday through Friday 9:00 am to 6:00 pm
Saturday 10:00 am to 2:00 pm

Appointments:

Appointments with tax professionals during tax season are flexible and can be scheduled outside of normal business hours.

We **WILL** call when your return is complete.

Average turn-around time is two weeks, with complete information.

All returns will be completed by April 15, 2010 ONLY if we receive **ALL** necessary information by March 21, 2010.

MISCELLANEOUS

Reprints: There will be a charge for reprints unless the mistake is ours.

Previews: You may preview your return before it is copied to avoid reprint charges. Tell us if you would like to preview your taxes when you come in.

We appreciate your continued business and friendship and look forward to seeing you in the next few months. Please feel free to email craigk@donaldandco.com with any questions you might have. If you need to schedule an appointment, call our office at any time.