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I hope you had an enjoyable holiday season and I wish you all the best for 2018 !

To assist in gathering the necessary information and documents for your 2017 tax returns I have attached your tax organizer and engagement letter for your completion.

The Tax Organizer is a very important tool to organize your information, communicate any changes and to assure completeness. I am working on my mind reading skills but this would give me a big leg up.

**To keep your fees to a minimum please be sure to provide a complete package.** Note that you need not transfer detailed information to the organizer if shown on a supporting schedule or tax document, W2 , 1099, K1 , etc., ( such as the listing of all stock trades etc. ), simply note "See Attached".

Once you have a **complete package**, please call my office at 805.238.9099 or e-mail me at [George@GeorgeDuckCPAs.com](mailto:George@GeorgeDuckCPAs.com) to schedule your year end conference, (or just stop by and drop off, or mail in, your package if you feel a conference is not necessary).

**Tax packages will not be accepted without a completed tax organizer with supporting documents and completed engagement letter.**

**Sooner is better ! Returns will be completed in the order information is received.**

**Information for Corporate and Partnership returns must be provided by February 20th, to avoid the possibility of having to file an extension.**

**Information for Individual returns must be provided by March 20th , to avoid the possibility of having to file an extension.**

If you have any questions or comments, just let me know.

Sincerely,

A handwritten signature in dark ink, appearing to be 'George Duck', written over a light-colored background.