



SCHEIDEL, SULLIVAN & LANNI CPA LLC
Business and Financial Advisors

Enclosed is your 2017 Tax Organizer. Please take time to review your Organizer and answer the questions presented. This will enable us to prepare your tax return accurately from the data you provide.

When you return your Tax Organizer, **please make sure to sign the engagement letter** and include it with copies of all source documents (1099s, W-2s, K-1s, etc.), along with new information that you believe to be important to your income tax preparation. It is not necessary that you re-enter information into the Tax Organizer that is contained within your source documents. ***IRS regulations require all charitable donations and unreimbursed business expenses need to be supported with appropriate documentation. We will ask you to sign a statement verifying these expenses if you do not bring in supporting documentation.***

Scheidel, Sullivan & Lanni, CPA LLC takes pride in preparing our clients' tax returns, so they may be filed on a timely basis. **However, to accomplish this, we require that you get us your information as soon as possible.** Returning your completed **Tax Organizer, signed engagement letter** and source documents to us, even if you are missing some information, will enable us to begin the process so we can finish your return in a timely fashion rather than waiting for you to compile all your information. **If we do not receive complete information by March 24, 2018, we cannot guarantee filing your return by April 15th.**

This year your tax return client copy will be given to you on a USB "card". Alternatively, we can provide your copy on either a CD, a paper copy, by email through an application called "ShareFile" or through a personal portal, which is an electronic gateway, so we can securely exchange digital files (such as tax documents). Please specify your preferred mode of client copy directly on your Tax Organizer. If you would like to have a personal portal set up for you, please contact us.

We will file your tax returns electronically, unless the tax returns do not qualify to be electronically-filed. Electronic filing is the required filing method for the Federal and all State governments. **By law, we must receive a signed IRS Form 8879 before your return can be released for e-file. There are no exceptions.**

Our accounting and tax services are offered through Scheidel, Sullivan & Lanni, CPA LLC, (www.sscpallc.com) and our financial planning, investment management and insurance services are offered through Sierra Financial Advisors, LLC (www.sierrafinancialadvisor.com). If you have any questions regarding any of these services or if there is something you would like to discuss, please feel free to call us at (201) 236-2226 or discuss it with us at your scheduled tax preparation meeting. We always look forward to hearing from you.

Please make sure you visit our website, as we have a lot of good tax information, especially for 2018 with the passing of the Tax Reform Act. We are also committed to assisting any friends or family that you feel could use our services. If there is anything we can do to help, please ask. We hope that together we can make this tax filing season a great one.

Lastly, please remember that payment is due when services are rendered. We continue to accept checks but can also accept MasterCard, VISA and Discover.

Sincerely,

Scheidel, Sullivan & Lanni, CPA LLC

"Thank you For Your Continued Support and Recommendations"