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January 2022

Dear Tax Client,

We hope this correspondence finds you healthy and well. We are ready for the 2022 tax season and would like to remind you on our firm's tax season process; we have summarized a few important topics and updates in this letter.

WHAT YOU NEED TO KNOW ABOUT THIS TAX SEASON

Please read this entire letter as our processes may have changed for 2022!

The tax filing deadline this year, without extension, is Monday, April 18, 2022. We strongly urge you to get us your information as soon as possible. You should begin gathering your information and referencing our tax organizer in January.

We will be having in-person meetings. Phone or virtual meetings are also available. Call (216) 521-2100 to request a meeting. Our current policy is all in-person appointments will require masks regardless of vaccination status.

There are several ways to safely provide your tax documents to us. Information may be mailed to our office, personally dropped off, or e-mailed to our office manager, Emily Brambrick at ebrambrick@laskeycostello.com. If you plan to drop your documents off after business hours, they may be placed in the secured mailbox located outside the office's front door. If you choose to e-mail your information, please note your name in the subject line and take steps to ensure cyber security (i.e. password protecting documents, etc.).

In addition to the options above, we have an online portal by which you can submit and retrieve documents. If you are planning to submit your tax documents using our client portal, you must ask for a document request by calling our office or emailing our office manager. Otherwise, we will not know that you uploaded forms or documents. After you contact us for a document request, a member of our staff will send you an email invitation to securely upload your documents to the portal.

In order to have your return completed by April 18th, please submit your tax information to us as soon as possible. We will do everything possible to turn around your tax filing in two to three weeks. The turn-around time may vary monthly. Tax returns are prepared in the order received regardless of complexity. If your information is received and we have not been able to process your return by April 18th, we will file you an extension.

APPOINTMENTS

If you have any detailed questions or would like to meet with us to discuss any new or unusual circumstances, please call the office to set up a meeting. Note that there are a limited number of appointments during this time frame, so please schedule early.

FEES

Our fees for tax preparation are based on the complexity of the return and the time it takes to prepare/file it. We accept Visa, MasterCard, American Express, personal checks, and cash. Following industry standards, all credit card payments will be subject to a 3% fee. Credit card and electronic check payments can be made via our website as well. **All payments are due upon receiving your return, no exceptions.**

OTHER IMPORTANT NEWS

For your convenience, all client tax returns will be available through our secure client portal. This portal will allow you to log in to our website to gain access to tax returns and other confidential documents at any time. As in prior years, you will also receive a paper copy of your tax return.

If you have any questions, please let us know. A satisfied client is our most valuable asset. Your recommendation to an associate, friend or family member is more significant than any advertisement. We sincerely appreciate your patronage and as always, we strive to provide you with professional and efficient service.

We look forward to seeing you in 2022. If you have any questions regarding this letter or our services, please do not hesitate to call.

Sincerely,



Cynthia M. Costello
Certified Public Accountant



William R. Costello, JR
Certified Public Accountant