DO&W PC
DUNCAN · ONLEY · WATCHINS
TAX, ACCOUNTING, & CONSULTING

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December 15, 2022

Dear Client(s),

We are gearing up for the 2022 Tax Season and are making some procedural changes to expedite our tax preparation for you.

With rising costs, the technological capabilities available today, and to be more environmentally friendly, we are going to offer you 3 options this year for you to receive a copy of your tax return(s).

1. You can access your returns through our secure portal called Rubex
2. We can provide you with a flash drive
3. You can receive a paper copy as we have provided in the past (This will require an additional preparation cost of $25)

You can make this choice when you complete the enclosed Engagement Letter. The Engagement Letter is an integral part of the tax preparation process. It defines what obligations we each are committing to regarding tax preparation. It is a legally binding document that must be completed for us to begin the process of tax preparation.

Another document that is enclosed is our Tax Information Worksheet. Completing this document assists us by providing the information necessary to complete your tax return. All the information listed may or may not be applicable to you and you can skip over those areas; however, the Personal Information section is vital for us to keep up with changes of address, email addresses, etc. Email addresses have become more vital due to technological advances that we are able to provide to you. As an example, being able to have you review your return and electronically sign the tax return(s) so that we can electronically file your return(s).

In an effort to keep up with inflation and the rising costs of maintaining our standard of service we will be increasing our fees by a minimum of 10% over the past year.

We have updated our website (dow-tax.com) and feel that you will find it to be very user-friendly. You can click on the word Client Center at the top of the page and scroll down to the tab that says Click Here to Download Our Tax Information Worksheet. You can print that form off from here. You then can scroll down to the Engagement Letters section and print off the Engagement Letter(s) that apply to you. For example, you can print an individual engagement letter, but you also have the capability to also print off other engagement letters that may apply to you such as business tax returns (for LLC's, partnerships, Corporations, and trusts).

We value you as a client and our goal is to provide you with the best possible service.

Sincerely,

*Duncan, Onley & Watkins, PC*