

C. A. White Accountancy

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Important for those who mail their tax data to us for tax preparation (including those who e-mail or fax as well) MAIL-IN DEADLINE IS MARCH 21, 2024.

Be sure to include in your package:

- 1) Engagement letter signed and dated*.
- 2) Mandatory AQ23 questionnaire completed and initialed*
- 3) Review all other questionnaires in the organizer. IF there are any “yes” answers, send that questionnaire with detail pertaining to the “yes” issue.*
- 4) Retainer of \$180; this is the first thing David looks for when he opens your package. You may send a check or call with a credit or debit card (MasterCard and VISA). Retainer for business entities is \$200.
- 5) Organizer: all pages that relate to you is best – but, at a minimum, include the pages that confirm current names, dependent information, address, telephone numbers, e-mail addresses and direct deposit account numbers!
- 6) Homeowners: county property tax statement (for non-deductible levies) and loan interest worksheet (for loan balances). If any refinances were made last year, please send copies of closing statements.
- 7) Copies of all forms W2, 1099 and/or K1. If you have any 1099B forms for stock sales, please include entire broker attachments for stock basis.

NOTE: it is no longer required to send original documents to us. Legible copies are preferred.

Failure to send all required information will delay starting the preparation of your tax returns.

You may mail/e-mail/fax your information to us if there are no changes in your straightforward tax situation. If your taxes are complex or your tax situation has changed, call us for a telephone appointment so we can review your situation together.

* Visit our website for these forms if you’ve misplaced copies we mailed or e-mailed to you. Corporate & partnership engagement letter are also available on our website.