



Welcome to another tax season! Thank you for choosing Peter Holtz CPA as your trusted tax preparer. We appreciate your business and will work hard to make sure you are satisfied with our service. Our goal is always to get you the best results and provide you with top notch service that sets us apart from all other preparers.

This letter will outline what you can expect from Peter Holtz CPA and what we need from you to provide you with the best service and most accurate results.

Peter Holtz CPA remains committed to you! All clients both current and new will receive a proposal and tax engagement letter via email. These documents will require your acceptance and a retainer fee for services. Upon acceptance of services and receipt of 2023 tax documents, Peter Holtz CPA tax advisors will complete an interview to update current information and ask questions of any changes that might have happened during the year.

Peter Holtz CPA uses the most updated technology in preparing your returns. Not only does our software provide us with tax updates and multiple layers of security, but we e-file your return for the fastest refund possible.

IMPORTANT!

The security of your personal information is extremely important. Peter Holtz CPA will no longer open attachments in emails. You will need to use your new secure client portal. An invitation to your portal will be emailed after acceptance of your tax proposal/engagement. We understand this is a new process, however it is the best practice in keeping your identity safe.

Reminders:

- You will need to provide forms W-2 from employers, forms 1099 from banks or other payers, form 1098 mortgage interest, form 1099-K from third party payment networks, form 1099-NEC for nonemployee compensation, form 1099-MISC for miscellaneous income, or form 1099-INT if you were paid interest, as well as records documenting all digital asset transactions.
- If you received assistance through the Healthcare Marketplace, you will need to provide form 1095-A
- If you purchased, refinanced or sold your home or other property in 2023, you will need to provide closing documents.
- If you made any charitable contributions, you will need to provide all acknowledgements, or alternatively a summary of your donations, with estimated values for donated goods.

- If you added a new addition to your family, please provide a copy of their social security card and provide date of birth.

Peter Holtz CPA will not audit or verify any data you provide. However we may ask for additional documents or ask questions to clarify. Peter Holtz CPA will use professional judgment in preparing your return in accordance with the law.

There will be an additional RUSH FEE (\$150) for any returns completed in which we receive your information within 45 calendar days of the filing deadline.

We look forward to working with you!