

Dear Client,

January 5, 2023

Cohick & Associates looks forward to helping you with your 2022 income tax returns and preparing you to have a successful 2023. As a year-round tax office, we are positioned to help you succeed, assist you with your unique situations, and guide you every day as your needs evolve. With that in mind, Cohick & Associates continues to tailor its services to better serve each client. This letter provides information about the filing process, the enclosed documents, and other highlights. **Thank you in advance for completing the enclosed orange “Tax Data Organizer” and pink “Final Checklist.”**

Cohick & Associates modified its services to make filing your tax returns efficient and easy. As a client, you have the option to speak with a tax professional by phone or in-person. For those of you who receive an annual appointment card but no longer require an in-person appointment, please contact the office to cancel the appointment. Your time is valuable and an in-person meeting may not be necessary as we have convenient delivery options available. Delivery of your tax documents can occur in one of two convenient ways: hand delivery to the front desk or use of the secured drop-off box. The drop-off box is located near the main entrance of the building, accessible 24 hours a day, and checked daily. If you use the drop-off box, please bind your documents and write your name, phone number, and “Cohick & Associates” at the top of your packet of information. One of our tax professionals will contact you if additional information is necessary.

As mentioned, an orange “Tax Data Organizer” and pink “Final Checklist” are enclosed. It is important for you to review and complete both documents. Careful completion will expedite the filing process.

Orange Tax Data Organizer: Page one of the orange Tax Data Organizer requests basic information and is the most important to all clients. Page two and the top of page three request withholding, investment, and retirement information. The bottom of page three and all of page four focus on deductions and credits.

Pink Final Checklist: The pink Final Checklist helps to ensure you have included everything necessary for an expedited income tax filing process. Do not skip this final step!

Your income tax return(s) cannot be processed without the orange “Tax Data Organizer” and pink “Final Checklist.” If you have questions while completing these documents, do not hesitate to call for clarification. Before delivering your tax documents, please use the “Final Checklist” to double-check that you have taken the necessary steps to compile your documents and information.

Please call Cohick & Associates at 717-249-5321 to schedule an appointment, cancel an appointment, or ask any questions about the filing process.

Sincerely,

Jeffrey S. Cohick, E.A. Christopher L. Farrands, CPA Shawn L. Bernheisel, E.A.
Megan E. Cohick-Eschenmann, CPA Theresa E. Lynch, CPA Gerald E. Piper, E.A.