Dear Client, January 3, 2024

Cohick & Associates looks forward to preparing your 2023 income tax returns! As a year-round tax office, we are positioned to help you succeed. Everyone at Cohick & Associates is committed to our core values as dedicated team players, learners, and good communicators. Our commitment to these core values differentiates us as a tax office and enables us to exceed your expectations. Thank you for reading this letter and completing the enclosed two-step information collection process.

Cohick & Associates strives to make filing your tax returns efficient and easy. Keep in mind that, as a client, you have the option to speak with a tax professional by phone or in-person throughout the year. 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. In lieu of an appointment, Cohick & Associates offers four convenient methods to deliver your documents: 1) in-person delivery, 2) use of the secured drop-off box, 3) mail, or 4) <u>secure</u> email.

> **IN-PERSON:** Organize your documents and alert the receptionist to any special instructions.
> **DROP-OFF BOX:** The drop-off box is located near the main entrance of the building, accessible 24 hours a day, and checked daily. Bind your documents together and write your name, phone number, and "Cohick & Associates" on top of your documents.
> **MAIL:** Contact the receptionist to alert us when mailing your documents.
> **SECURE EMAIL:** Contact the receptionist to utilize our secure email service (SafeSend).

The enclosed two-step information collection process is comprised of a "Tax Data Checklist" (TDC) and a "Tax Data Organizer" (TDO). These must be completed by each client. We want this to be an easy process for you so contact us for assistance as necessary!

> **STEP 1: TAX DATA CHECKLIST (TDC):** The TDC provides some basic tips and ensures you include everything essential for an expedited income tax filing process.
> **STEP 2: TAX DATA ORGANIZER (TDO)**: Page one compiles basic information and key documents. Page two and the top of page three gather withholding, investment, and retirement information. The bottom of page three and all of page four collect deductions and credits.

In recent years, we have been inundated with erroneous notices from federal, state, and local tax authorities. We stand behind our work and will never charge for a response if it is a result of our mistake. However, like most offices, we will begin charging a fee for responses resulting from client and/or tax authority errors. Additionally, please keep in mind that payment is due upon completion or pickup. Payment methods include cash, check (preferred), or credit card (subject to service fee).

We look forward to serving you! Please contact us at 717-249-5321 with any questions or concerns.

Sincerely,

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