

Dear Client,

January 2, 2025

Cohick & Associates is excited to prepare your 2024 income tax returns! Due to high volume, completion of your income tax return can take up to four weeks and may take longer due to missing or delayed documents, complexity, and other factors. Your patience is appreciated as we take the time necessary to complete your tax return accurately. From February to April 15, our office is open from 8:30 AM to 6 PM Monday - Thursday, 8:30 AM to 5 PM on Fridays, and 9 AM to 2 PM on Saturdays. Please read the rest of this letter and complete the enclosed tax data checklist and tax data organizer.

Cohick & Associates strives to make filing your income tax returns efficient and easy. We offer four convenient methods to deliver your income tax documents: 1) in-person delivery, 2) secured drop-off box, 3) mail, or 4) secure email.

**IN-PERSON:** Organize your documents and alert the receptionist to any special instructions when you bring them in.

**DROP-OFF BOX:** The secured 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 so they can expect your documents.

**SECURE EMAIL:** Contact the receptionist to utilize our secure email service (SafeSend).

A tax data checklist and tax data organizer are enclosed with this letter. These must be completed by every client to ensure that every credit, deduction, and document is properly reported.

**TAX DATA CHECKLIST:** The checklist provides basic tips and ensures you include all the documents and information necessary for an expedited income tax filing process.

**TAX DATA ORGANIZER:** Pages 1 and 2 compile basic information for all personal income tax returns. Pages 3 and 4 focus on those operating a business or rental property. After completing the tax data organizer, please sign it at the bottom of page 4.

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 charge 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 of your tax return. Payment methods include cash, check (preferred), or credit card (subject to service fee). Lastly, we enjoy meeting with our clients, but some consultations will incur a fee for our time.

Thank you for trusting us with your tax needs! Please contact us at 717-249-5321 with any questions.

Sincerely,

Jeffrey S. Cohick, E.A.      Christopher L. Farrands, CPA      Shawn L. Bernheisel, E.A.  
Derek Bush, E.A.      Megan E. Cohick-Eschenmann, CPA      Kristina Hoagland, E.A.  
Kelsey Varron, E.A.      Gerald E. Piper, E.A.