

**CATHERINE E. THOMAS CPA**

January 17, 2012

Dear Client:

Enclosed are documents to assist you for this year's tax season.

The task of gathering your tax information together is an unavoidable but important one. This packet contains information to make this process as efficient as possible and in turn give me the needed information to prepare accurate returns while trying to minimize your tax liability as much as is legally possible.

Enclosed you will find:

- Ø Tax Organizer & Questionnaire
- Ø Summary of Selected Tax Law Changes for 2011 & 2012

By default, all returns that can be filed electronically will be, by my firm. Of course, you have the option to paper file. I do like using technology to communicate and ensure the latest tax updates are in place but am very cautious with the information you entrust me with. Despite encryption capabilities and anti-virus software, I will not ask for Social Security numbers or other critical identification numbers in the body text of any e-mail.

A good way to minimize taxes is to be organized and plan ahead so please let me know of any major life changes that you are considering or that may be forthcoming. (e.g marriage, sale of stocks or options, moving, self-employment, retirement, etc.)

Once you have the information gathered, you may mail the information to me at the address below, bring it with you to our appointment, or email the information to me at [ce\\_thomas@msn.com](mailto:ce_thomas@msn.com). To schedule appointments, please call 520-275-4824 or send an email.

I am trying to schedule most appointments (times shown are appointment start times):

- Ø Mondays, Wednesdays and Fridays between 8:15 and 1:30
- Ø Thursday evenings between 4:30 and 7:00 pm
- Ø Saturdays between 10:00 am and 2:00 pm

I am looking forward to working with you over the next few months. A business goal of mine is to keep my business at a manageable size so I can work with you directly and do a quality job. I am fortunate to have so many wonderful clients.

Warmest Regards,

Cathy