

November 29, 2023

To: Individual Tax Client

RE: Year-end tax planning

Dear Client,

2023 is rapidly coming to a close. Now is the time to start preparing for year-end income tax planning. Please find enclosed our **2023 Tax Organizer**. Please use this form to aid you in assembling your tax information, along with all supporting documents. ***The Tax Organizer must be signed and returned to our office when your year-end tax information is turned in.*** The next item enclosed is our **2023 Tax Preparation Engagement Letter**. The form needs signed by all taxpayers and return to our office with your 2023 tax information.

As per the Internal Revenue Service, all 2023 individual tax returns we prepare must be electronically filed. Please provide us with a voided check should you want to direct deposit any refund. (Deposits of refunds and payments of amounts due can still be mailed manually.)

To ensure that your return is prepared in a timely manner please see to it that we receive all of your **information along with the completed tax organizer and signed engagement letter at one time.** To ensure your 2023 income tax returns are completed by April 15, 2024 we must receive all of your tax information no later than **March 15, 2024.**

Should you have any questions concerning your 2023 income taxes, please give us a call. We stand ready to assist you with the filing of your 2023 income tax returns.

For over sixty (60) years the Cooper family has provided accounting and tax services to individuals and small businesses throughout West Virginia and many other states. We thank you for your business and look forward to many more years of serving you! If you are satisfied with our services, we ask you to tell a friend about our services. We welcome new clients!

Sincerely,
Cooper & Associates A.C.