January 2017

~ New Year's Greetings with Best Wishes to and Gratitude for
Our Diverse and Talented Community of Clients ~

In order to remove as much of the Tax Preparation burden from you as we can, we offer the following:

• 2016 Personalized Tax Organizer (Questionnaire + Worksheets)
  ✓ ANSWER ALL THE QUESTIONS ON THE QUESTIONNAIRE – Required of all clients
  ✓ Returning clients – Worksheet attachments reflect your 2015 tax information for reference
  ✓ Need Worksheets? Please call our office or go to www.islandcpas.com

• New Clients – Please be sure to provide a copy of your previous year’s Tax Return

• Deadlines:
  Tue, Feb 28: Deliver completed Organizer and Tax Data to enter our Getaway Weekend Drawing
  Fri, Mar 10: Deliver completed Organizer and Tax Data to meet filing deadline of Tues, April 18
  Fri, Mar 10: Last day for appointments. Bring your tax questions and concerns to us early
  Sat, April 1: If you think you owe the IRS, deliver adequate data to us so we can prepare an extension

• FOLLOW THE GUIDELINES BELOW to keep your Tax Preparation costs down:
  ✓ Use your Organizer Worksheets for Data Entry
  ✓ Enter TOTALS on Worksheets – No receipts, please - file receipts at home in case of audit
  ✓ Write information clearly and darkly - a BLUE or BLACK pen is BEST
  ✓ No spreadsheets, please. Enter your TOTALS on Worksheets
  ✓ Do not enter the same piece of data in two places
  ✓ NO POST-IT NOTES - Please use white space for handwritten notes
  ✓ If you must highlight, use YELLOW highlighter only
  ✓ If you deliver your data in electronic form, we do not need paper copies of those documents

• Chance to Win a Getaway Weekend!
  Complete the questionnaire, deliver all the requested documents you have received to date, turn your packet in to our office by February 28 and your name will go into our drawing. See enclosed flyer

Our Firm’s Cash Contributions + Your Canned Goods Collected Here =
Our Annual Food Drive for the Vashon Food Bank

~ Lake Kennedy McCulloch, CPAs and Vashon Island Staff ~
Peter Lake, CPA Carmelita Logerwell, MS CPA Sally McColloch, CPA
Barb O’Block Marie Browne Karol Lake Carla Pizzano