



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](http://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