



New Year's Greetings To All Our TAX EXEMPT Clients!

- Tax Exempt Tax Return **Due Date** - Wednesday, **May 15, 2024**
- If you go on **Extension**, filing deadline is - Friday, **November 15, 2024**
- Tax Returns will be prepared on a **First Come, First Served** basis, assuming all data has been received

WE WILL BEGIN WORK ON YOUR TAX RETURN WHEN WE HAVE ALL OF THE FOLLOWING COMPLETED AND RETURNED TO US:

- **Client Information Review Sheet** – Please review and correct as needed
Please choose your Client Copy Format & Sign
- **Tax Preparation Questionnaire** – Please review and respond, providing any requested documentation
- **Officers List** – Please review and correct as needed
- **Future Depreciation Report** – See *Questionnaire*, #18
- **Clean Financial Statements or access to QuickBooks** file that is ready for tax preparation

PLEASE NOTE: To increase our efficiency and lower your cost, please deliver all your requested data at one time AND respond quickly to our questions and data requests.

~ We look forward to working with you. Please let us know of any questions ~

Peter Lake, CPA
Lisa Huggenvik

Renee Butz, CPA
Michael Butz Dayna Jessen

Carly Christophersen, CPA
Karol Lake

Vashon Island

PO Box 1935 206 463-9944 office
10007 SW Bank Road 206 686-5004 fax
Vashon, WA 98070-1935 www.islandcpas.com

San Juan Island

425 Caines Street 360 378-2496 office
Suite A 360 378-2662 fax
Friday Harbor, WA 98250 www.islandcpas.com