



## ***New Year's Greetings To All Our TRUST Clients!***

- Trust Tax Return **Due Date** - Monday, **April 15, 2024**
- If you go on **Extension**, filing deadline is - Monday, **September 30, 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 THE FOLLOWING COMPLETED AND RETURNED TO US WITH ALL DATA:**

- ***Trust Organizer/ Client Information Review Sheet*** – Please review, correct, and respond, providing all requested data and documents

**Please choose your Client Copy Format & Sign**

**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 ~***

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