



January 2019

To Our Valued Clients:

The holiday season is behind us and the season for filing our annual income tax returns is here. To assist you in the process, our office has prepared the enclosed tax package. Please take some time to review the enclosed information and call the office with any questions.

For our in-house bookkeeping clients: Please sign and return the enclosed engagement letter. We will contact you if we need further clarification on any items for year end.

For all other clients: Once you have reconciled your December bank statement, please provide us with:

- A QuickBooks backup (if applicable) or your 2018 records.
- Dec 2018 and Jan 2019 bank and credit card statements
- Loan balances and interest paid on all business loans
- Documentation on any new loans and/or equipment purchases
- A completed Business Worksheet (included in this mailing)

For those clients that do not pay a regular monthly fee, we are requesting a \$250 deposit when you provide your initial tax information to our office. This deposit will be applied against the balance due when your return is completed.

If you need a consultation when you provide your information, please call the office as soon as you can to schedule an appointment. A consultation is not needed if you are simply dropping off your information, but please allow a few minutes to discuss your tax information with us.

Please call our office if you have any questions.

Sincerely,

Tim Miller

Tim Miller, CPA

Brandon Layo

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