



STRANGER, TALLMAN & LAUTZ
ACCOUNTING

Dear Client,

Tax filing season for 2020 is just right around the corner! We wanted to reach out before we send out organizers with some important updates and information. Watch the mail in the next few days for your organizer packets.

First off, thank you for your continued partnership with us! 2019 was a great year for our firm and our community and we are looking forward to another wonderful and prosperous year.

Client Portal

We are making some changes to further improve our efficiency in communicating with you, our clients. One of the changes we have made is moving to a more user-friendly client portal. As always, you will be able to securely send and receive documents and view and pay your invoices, and now you will also be able to view requests we have made of you (for example, additional documentation requested). We will be adding you to the portal in the coming weeks so please keep an eye out for an invitation to log in. We will be using the email address we have on file for you so if that needs updated, please contact us. If you have documents to transmit or request in the meantime, please let us know so we can invite you right away. The new web address to access the portal is stlagj.clientportal.com. There is also a link to this page on our website. The old portal will still be accessible for some time, but we will not be posting new documents or information there. There is also a mobile app available – search for “Canopy Client Portal” on the Apple App Store or the Google Play Store.

Digital Organizer

New this year, we have the capability for you to complete your organizer in a user-friendly web form rather than on paper. We can also provide you with a fillable PDF version of the printed organizer. If you didn't request a PDF organizer last year, please email staff@stlagj.com or complete the form at <https://tinyurl.com/s8ukwz6> if you would like us to send you either digital version of the organizer.

Email Communications

To save time and be as efficient as possible during the hectic busy season, we often correspond by email as we prepare your return. Please check your email at least daily, and respond promptly, while we are working on your return.

Engagement Letter

As usual, you will receive a paper engagement letter with your organizer. If you would prefer to sign the engagement letter electronically, you may do so at <https://tinyurl.com/rvzogmc>. There is also a link to the e-signable letter on the Forms section of our website.



Forms

Enclosed you will find two forms to help us get you set up for the 2019 season. The first is the package election form to select the tax preparation package you want. You can also complete this form at <https://tinyurl.com/vf6euy1> or by going to the Forms section of our website. See the enclosed brochure for more details on what benefits are included with each package. The second is the preferences form. This form lets us know how to handle the results of your return, among other information. Please complete the forms and return them to us with the rest of your documents.

Inquiry Protection

Inquiry Protection is now included with *all* individual tax returns! What this means is that, if you receive a notice or letter from the taxing authorities regarding your 2019 tax return, the cost of responding to the notice is completely covered. There is also an identity theft protection and penalties component to this protection. You may still opt out of the program, but there will no longer be a discount on your return prep fees for doing so. Contact us for more information on this program.

Check the Status of Your Return

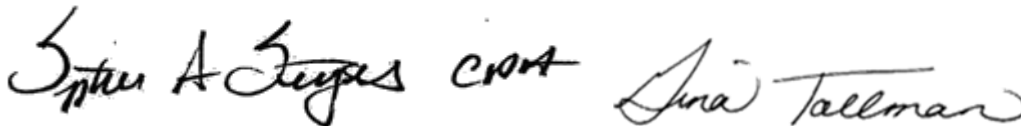
Also new this year, you will be able to check the status of your return preparation on our website! Access the lookup tool in the Contact section of our website or by going to <https://tinyurl.com/wk8olql>. Please note: we update this information once per day, overnight, and the refund or balance due information is not to be relied upon unless your return is completed.

New Team Member

Please say "hello" to Cheryl Bynum, our new Firm Administrator, next time you are in the office. Cheryl recently moved to the Grand Valley from Moab, and with her background in management and public relations, we think she will be an excellent and valuable addition to our team. We are thrilled to have her on board!

We sincerely appreciate the opportunity to continue to work with you in 2020. Please don't hesitate to contact our office if you have questions about any of this information.

Sincerely,

Handwritten signatures of Stephen A. Lautz and Anna Tallman. Stephen's signature is on the left, and Anna's is on the right.

Stranger, Tallman & Lautz Accounting

Enc:

Package Election Form
Preferences Form



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Package Election Form

Business or Individual Name: _____

Type of project (individual or business tax, accounting, payroll): _____

Year: 2019

This is the service I want

Please check the box for the option you want.

Option 1: Mesa Premium Services

Option 2: Monument Full Services

Option 3: Bookcliff Essential Services

Your signature

Date

Tax Preparation is complicated

Mesa Premium

This is the best option for clients seeking all inclusive tax support, advice, and planning to help minimize your tax burden.

Monument Full

This is our most popular option because it includes tax inquiry support and reminders of tax payments due. This is the best option if you want complete peace of mind.

Bookcliff Essential

This option is for those who are on a tight budget and are happy to miss out on some of the more valuable input from us, and instead only receive the essential elements.

	MESA	MONUMENT	BOOKCLIFF
■ Your investment is just...			
■ Professional preparation of current year tax returns	✓	✓	✓
■ Securely e-file Federal and State tax returns	✓	✓	✓
■ Paper copy of current year's return	✓	✓	✓
■ Electronic copy of current year's return	✓	Upon Request	Upon Request
■ Correspondence Inquiry Protection	✓	✓	✓
■ Weekly tax newsletter	✓	✓	✓
■ Discount for extended returns	✓	✓	✓
■ Tax interview meeting	✓	✓	✗
■ In person, phone or email consultation	1 hour	1/2 hour	Available
■ Advice and consultations for your family	✓	✓	✗
■ Checking your prior returns (new clients only)	✓	✓	✗
■ Checking your IRS and State estimated tax payments	✓	✓	✗
■ Provision of payment reminders	✓	✓	✗
■ Family member discounts	✓	✓	✗
■ Comprehensive year-end tax planning	✓	✗	✗
■ Filing Status Analysis	✓	✗	✗
■ Tax return review meeting	✓	✗	✗
■ Monthly subscription fee making it easier for you to budget	✓	✓	✓

Note: if you are a business, The price of this service is fully deductible for tax purposes, which means, in effect, the taxing authorities will refund you a portion of the cost (subject to the rate of tax you pay).

Refer to pricing agreement for full details



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DRIVERS LICENSE/STATE ID INFO - REQUIRED

Taxpayer:
Name on Identification _____
ID Number _____
ID State of Issuance _____
Issue Date _____
Expiration Date _____

Spouse:
Name on Identification _____
ID Number _____
ID State of Issuance _____
Issue Date _____
Expiration Date _____

REFUNDS / TAX DUE - REQUIRED

IF YOU HAVE REFUNDS

For Federal refund, do you want to apply it to next year's Federal Taxes? Yes _____ No _____
For State refund, do you want to apply it to next year's State Taxes? Yes _____ No _____
If refunds are NOT applied, do you want your refunds Direct Deposited? Yes _____ No _____

If you provided a voided check to us previously AND your account has NOT changed, INTIAL HERE _____ for us to use the same account this year. You do NOT need to provide another voided check.

If we do NOT have your bank account information, please provide a voided check for direct deposits and/or debits.

IF YOU OWE TAXES

If you owe taxes how do you want to pay them by: Check _____ or Direct Debit _____

If direct debit - list the dates you want the taxes debited from your account, up to the due dates:
Federal _____ State _____

If you are unable to pay your taxes owed, we can assist you in making a payment plan with the IRS and/or State.

REFUND COLORADO PROGRAM

If you have a Colorado refund, do you want to donate some or all of it to an eligible Colorado charitable organization? Yes _____ No _____ Only if my refund is more than _____

If yes, what organization(s) would you like to contribute to?

Name _____ Registration # _____ Amount _____

____ Please look up the registration # for me (note: if the organization you select is not eligible, we will have your refund sent to you)

More information about this program is available at refundwhatmatters.org

YOUR COPY OF THE RETURN

Please check how you would like a copy of your Tax Return: PAPER _____ PDF _____ BOTH _____

Please check how you would like to receive next year's organizer: PAPER _____ PDF _____

EXTENSIONS

All required information is due to our office by 5pm on March 22, 2019 in order for your taxes to be filed on time. If you will miss our March 22nd deadline you must notify our office that you require an extension.