

Paul S. Marciano, CPA, LLC.

Accounting and Tax Services

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100 Cummings Center, Suite 207-F
Beverly, MA 01915

paulmarcianocpa.com

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TO ALL EXISTING AND NEW CLIENTS:

The 2023 Holiday Season has passed and it is time to start thinking about having your 2023 Federal and state tax returns prepared. Despite the progress that has been made in vaccinating individuals, the Covid-19 Pandemic remains and continues to impact our lives and the manner in which we conduct business. In order to conduct our business in a manner that puts the safety of our staff and clients first, **we will be conducting our business in the same manner at last year as outlined below.**

1. Attached to this Welcome Letter are the following materials: (i) our 2023 Client Engagement Letter, (ii) a customized client specific 2023 Tax Organizer, and (iii) a return envelope.
2. Upon receipt, **(i) initial, sign and date the Engagement Letter, (ii) enter all the necessary information on the Tax Organizer and initial each page of the Tax Organizer, (iii) IF NECESSARY, download from our website (paulmarcianocpa.com) copies of any requested form that you need to complete and (iv) gather up all of your necessary tax related source documentation** (e.g., W-2's, Forms 1099-R, 1099-NEC, 1099-MISC, , 1099-B, 1099-INT, SSA-Form 1099, applicable health insurance coverage forms, documentation of expenses, etc.). We prefer that you make copies of your original source documentation for submission to us, rather than providing us with the original source documents, which you should retain for your files.
3. **Please return the Engagement Letter, Tax Organizer, applicable Tax Organizer Supplements and your source documentation to our office in one of the following four (4) methods:**
 - (i) **Place the material in the envelope provided** and slide it in the mail slot in our office door at **100 Cummings Center, Suite 207-F, Beverly, MA 01915** (the same office as last year); **OR**
 - (ii) **Mail the material to us** addressed to **Paul Marciano, CPA, 100 Cummings Center, Suite 207-F, Beverly, MA 01915; OR**

- (iii) **Fax the material to us** at 978-998-4940; **OR**
 - (iv) Email the material to us at paul@paulmarcianocpa.com. ***If emailing, please do not email any documents showing your social security number unless your social security number is whited out or thoroughly crossed-out.***
4. Upon our receipt of your signed Engagement Letter, completed Tax Organizer, completed Tax Organizer Supplements, and supporting documentation, we will commence working on your return. If we have questions or required additional information or documentation, we will contact you either by email or phone.
 5. Once we have completed your return, we will forward the return to you, along with instructions and the necessary forms we will need you to sign prior to our electronically filing your returns.

General Guidance

1. As always, the sooner you provide us with all the necessary forms, information and documentation, the sooner we can prepare and file your returns. ***If you do not provide us with all the information we require by the close of business on March 1, 2024, we cannot guarantee that your return will be completed by the April 16th filing deadline, meaning that we may have to file for an extension.***
2. Due to the ongoing threat of respiratory illnesses our staff may be working remotely meaning that our office will not have regular business hours and may be “closed” at various times during the normal work day. You can drop material off at our office at any time by sliding an envelope through the mail slot in our door. The material will be picked up by a staff member daily.
3. If you have questions and need to speak to a member of our staff, please call the office (978-969-1451) to schedule a phone conference or a Zoom computer conference with one of our staff members. If no one answers the phone, please leave a voice message as we check for messages throughout the day. ***When leaving a voice message, please speak slowly and (i) state the reason for you call; (ii) state your call back number; (iii) repeat your call back number; and (iv) indicate when the best day and time to reach you.***
4. ***Due to the ongoing threat of spreading respiratory illnesses, in-person office visits are discouraged and will only be permitted on an extremely limited, pre-approved basis.***

I look forward to assisting you in preparing your 2023 Federal and state income tax returns. I believe the protocols and procedures described above will enable us to continue to provide you with quality professional services while maintaining the safety of our staff and clients.

Thank you.
Paul Marciano, CPA