



VANBAUM & ASSOCIATES, LTD
ACCOUNTANCY, TAXATION & REPRESENTATION

404 Alpine Dr.
Round Lake, IL 60073
P: 847-345-1437
F: 847-357-8705
www.vanbaumaccounting.com

January 15, 2023

Dear Prospective Client:

New tax legislation has made a few changes to your 2022 tax return and opened the door to many planning opportunities for 2023 and beyond. We are excited to help you take advantage of them. To provide the highest level of client service possible, please note the following changes to our income tax preparation procedures.

- **Appointments.** We are no longer scheduling in person tax preparation appointments. The drop off, prepare, deliver method of tax prep saves our client's time and energy, lets us to work on tax returns on a first-come-first-serve basis and allows us to focus on preparing a complete and accurate tax return.
- **Fees.** You'll notice the base fee for tax preparation has gone up by \$75 this year. We haven't raised fees for two years now and feel this is necessary to continue to provide you with the highest level of customer service and expertise that we can. We understand that inflation affects your family just like it does ours and that fee increases may cause you to look elsewhere for your tax preparation needs. If that's the case, please note that we completely understand and that we will always appreciate your past patronage.
- **Video Review.** Upon completion of the tax return, Keith will record a brief video summary of the return and any planning tips for 2023. A 15-minute phone call/Zoom is available upon request.
- **Hard cut off April 1.** To guarantee that we'll be able to complete the return on time, we require **ALL** your documents by April 1st. If we're still missing documents from you after that date, we may need to file an extension. If you onboard (begin uploading documents) after April 1st we will do the best we can to complete your return or get you an estimate of what is owed with the extension but extra fees will apply.

What you need to do. Please find the enclosed tax document checklist and engagement letter. *We need the signed engagement letter with your tax documents to prepare the return.* Once you're confident that you have everything that we'll need to complete your return:

1. Visit clients.vanbaumaccounting.com & login (or Create Account)
2. Complete the client interview
3. Upload your tax documents

It's that easy! If you have any trouble with clients.vanbaumaccounting.com, Heather is our in-house support person and can be reached at heather@vanbaumaccounting.com or by phone/text 847-366-6099. If you prefer not to upload your documents, you can stop by our home office and drop them off in our secure vault out front. Or mail/FedEx them to us: 404 Alpine Dr, Round Lake, IL 60073. We're looking forward to working with you.

Keith Baum, EA & NTPI Fellow