



**VANBAUM & ASSOCIATES, LTD**  
ACCOUNTANCY, TAXATION & REPRESENTATION

404 Alpine Dr.  
Round Lake, IL 60073  
P: 847-345-1437  
F: 847-357-8705  
[www.vanbaumaccounting.com](http://www.vanbaumaccounting.com)

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Dear Prospective Client:

We hope that you had a wonderful 2023. As an office, we are excited to see whether you were able to take advantage of the new tax credits and planning tips we highlighted in last year's tax return review videos. We received a lot of positive feedback about those videos so we will again be providing them along with every return we prepare. Please note these other features of our workflow this season.

- **Appointments.** We are no longer scheduling in-person appointments. Our method of upload/drop-off > prepare > electronic delivery lets us provide you with fast, accurate & highly personalized tax prep service.
- **Fees.** Our pricing has always been based on complexity and, in some cases, the time it takes to complete the return. To keep your fee as low as possible please do the following: upload all your documents at once rather than piecemeal and do so as soon as possible. A complete breakdown of our fee structure is available on the enclosed rate sheet.
- **Video Review & Tax Planning.** Upon completion of the tax return, we will record a brief video summary of the return and tax planning tips for 2024. If you still have questions after watching your video, a 15-minute phone appointment is available upon request. If you need tax planning throughout the year, we are happy to provide it.
- **Extensions.** 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 1<sup>st</sup> we will do our best to complete your return or get you an estimate of what is owed with the extension and 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](http://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](http://clients.vanbaumaccounting.com), Heather is our in-house support person and can be reached at [heather@vanbaumaccounting.com](mailto: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