

# CLAUDIA A. TRAYNOR

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CERTIFIED PUBLIC ACCOUNTANT

Greetings! We hope that 2023 has been a good year for you and we value the opportunity to work with you again this year. Our office is always evolving to find the best way to meet our client's needs and expectations while balancing the needs of our staff.

We will continue our past practice of not scheduling any sit down appointments. Most people find that dropping off/mailing in their tax documents (either at the counter or in the secure drop box outside our front door) and then having a phone conversation after we were able to review them is more convenient for most people and much more productive for us. We will continue to have a second counter by our back door so we can help 2 clients at a time. Masks are not required of anyone entering our office unless you are not feeling well.

Our January hours will be limited to Wednesdays (or by appt) but we will be open Monday-Friday starting February 1<sup>st</sup> for Tax Season.

We request your tax information to be in our office at least 2 weeks before the tax deadlines. A reminder to all that we will NOT automatically extend your tax return unless you contact us to do that.

Following industry trends, we will be passing on the expense of using a credit card for payment. We are adding a 3% service charge to all credit card transactions. Paying with cash or checks will remain unchanged.

We are enclosing the Engagement Letter (**blue paper**) for you (and spouse if married) to sign and return to us with your filled out Personal Tax Worksheets and tax papers. We will also be posting them on our website at [www.catcpa.net](http://www.catcpa.net). Click on the link for 2023 Tax Year Worksheets. For new tax laws and changes, please go to our website and click on the link for 2023 Tax Changes & Tips.

As always, we welcome new clients and deeply appreciate our current clients! It has been a privilege serving you and we look forward to talking with you soon. Our office staff is committed to helping you through the endless maze of tax laws to get you the biggest refund or to pay the least amount of tax. We succeed when you succeed! Thank you for your loyalty and friendship!

~Claudia & Staff (Kim, Margaret, Minda, Nickie, Mike and Kathy)

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