

## Zaffore Ruane Gerdemann CPAs PC

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### January 2016 – Short Letter (the long letter is on our web site)

Hello and welcome to your 2015 Tax Preparation Package. You should find:

- Plastic envelope (s)
- Engagement letter(s)
- Capitalization Policy – businesses only (1065, 1120, 1120S, some Schedule Cs)
- Questionnaire—1040 only
- Permission Forms for Extension(s)-on the questionnaire!
- Short Organizer with your 2014 information printed on it (if you were a client of ours last year)—1040 only
- Return address sheet
- Colorado Charity Check-Off List (please consider this!!)  
[www.coloradocheckoff.com](http://www.coloradocheckoff.com)

Please gather your tax documents and get them to us as soon as possible. It is ok to drop them off in your plastic envelope, mail them, fax them, scan and post them to the portal. Do not email them since they contain a LOT of personal information that you and we would prefer not to have accessible to pirates.

Use the organizer as a checklist to—(drum roll please) organize your data. The organizer will help you recall what you have given us in the past. We have longer and more detailed organizers and would be happy to provide one for you if you would like. Contact Laurie or Amy.

**You must sign and return the engagement letter and the completed questionnaire before we can even start your tax return. We will scan all of your data and return it to you when your returns are completed, including the engagement letter.**

**We cannot e-file your returns until you have signed the e-file permission forms and made arrangements to pay for our services.**

What is ***NOT*** in your tax package:

- Our annual “long” Taxpayer Letter – chock full of all kinds of good stuff
- Team Gossip
- Tax Tidbits (like mileage rates, pension funding limits, etc)
- Business Client Update
- Our “slow poke” disclaimer (see Taxpayer Letter)
- Invitation to Money Club
- **Announcement of new name!!! (see the long letter)**

You can find all of these and MORE on our updated web site at [www.zaffore.com](http://www.zaffore.com). Look for the easy-to-locate box at the top, next to a photo of our rosy office building. If you do not have a computer or internet access, and would like any or all of the above, we can get it to you. Ask Laurie or Amy.

For those of you who are into **social media** – we have a contest for you on the web site.

For **everyone**, think about joining a Money Club this year to resolve to:

- Understand (and make peace with) your money
- Work your money so it lasts a lifetime (and beyond??)
- Work more effectively and intelligently with financial planners and advisors
- Don't worry, be happy – OK, that is more the goal than the resolution....

We really hope you will visit the updated site and skim through some of the **IMPORTANT** info you find there. There will be a quiz.

*Last but not least....*

When you are looking for us: The Town of Parker completed our street a year ago, so that it now connects to South Pine Drive to the east and Pikes Peak Drive to the west. It is no longer a dead end. And thus, we are now on Pikes Peak AVENUE—although many GPSs deny that there is an Avenue and want to take you to Court – that will work.

Incidentally, South Pine Drive does not connect to North Pine Drive. And Pikes Peak Avenue intersects with Pikes Peak Drive. And Mainstreet is indeed spelled Mainstreet. Yep.