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Welcome to another tax filing season! Thank you for your confidence and trust in our firm.

We have an optional **tax organizer and questionnaire**, that is helpful for making sure that your tax record is complete and nothing is overlooked. You can complete & submit this electronically on our **Liscio platform**, and upload all your documents there as well.

- If you would like the electronic organizer, please request this. **OR**
- You can request that a paper version of the tax organizer be mailed to you.

Most of you have used our Liscio platform. You will find it even more functional and convenient this year, and we encourage you to use it to message us and send us documents. Liscio is much more secure than email and messages never end up in the spam folder!

In order to meet the tax filing deadline, we encourage you to submit your tax data to us by **March 15**. If you anticipate late-arriving 1099's or K-1 forms, you can note that for us and send those to us later.

You can leave your tax forms with the receptionist in our **lobby 9-5 Monday-Friday**, avoiding the noon lunch hour please. Or you can call and request a **drop-off appointment** be scheduled.

Reminder: Include your signed engagement letter with your tax documents; **not before**.

Check out our website **keithkenwardcpa.com** for information about Home Energy tax credits, Electric Vehicle tax credits, and other topics.

Please feel free to contact us if you have any questions.

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