

WAYNE ERDMAN, CPA
ACCOUNTING SERVICES & TAX PREPARATION

1051 Old Henderson Road, Suite B
Columbus, Ohio 43220

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P 614 442 0232
F 614 442 0313
Website: www.erdmancpa.com

**IMPORTANT: Please have all your tax documents in
in by March 12 th so we can file your returns on time.**

Happy New Year!

This is our annual reminder that it is time to gather your tax documents for tax year 2018

Please try to have all your tax documents organized and be sure you are not missing any documents before bringing them to the office. We need to have all your information by March 12 , 2019 to file on time.

Refer to the enclosed checklist to make sure you have not missed anything. The better organized your information is presented to us, the more efficiently we can prepare your tax returns. Copies of the listed forms may be printed from our website at www.erdmancpa.com .

IMPORTANT FORMS TO FILL OUT AND RETURN WITH YOUR TAX DOCUMENTS

- 1) CHECKLIST & CHANGE FORM: Please fill out and return to our office with your tax documents. We require *all clients* to fill out a new Checklist & Change Form each year.
- 2) CLIENT ENGAGEMENT LETTER: Please read the enclosed engagement letter and sign before returning it to us with your tax documents. This is required each year for us to prepare your tax returns.
- 3) DIRECT DEPOSIT FORM: Please fill out and sign this form if you wish to have your refunds directly deposited into the account you indicate, and return to our office with your tax documents.
- 4) HEALTH INSURANCE VERIFICATION FORM: Please fill out and return to our office with your tax documents. We require *all clients* to fill out a new Health Insurance Verification Form each year.
- 5) OHIO DRIVERS' LICENSE FORM : Please fill out and return to our office. This is required every year to file with State of Ohio for refunds

You are welcome to drop off your organized tax documents at your convenience; you do not need to call us. Should we not be in, we have a drop box on the front of the door. *Should you have questions and/or need an appointment, please call ahead to schedule an appointment so we can be available to answer your questions. You can also e-mail Tonia at tonia.erdman.cpa@gmail.com to schedule an appointment or to ask questions prior to dropping off your documents. Thank you.*

Our e-mail addresses are:

WAYNE: wayne.erdman.cpa@gmail.com
TONIA: tonia.erdman.cpa@gmail.com

We thank you for your continued patronage and look forward to working with you this year.

Wayne Erdman CPA, Inc.

Please turn over for further information