



January 1, 2024

Thank you for choosing PK Tax Services! Please know that your satisfaction is our utmost priority. We take pride in getting your return done right and being here throughout the year for all of your tax needs.

In order to begin preparing your tax return, we will need a signed engagement agreement and the following additional information which should be provided from other third parties within the next few weeks. Once you have received all of your documentation, you can either drop off your documents, upload them to the portal or mail them to the office. Please know that we operate on a first come, first serve process. We work on the returns as quickly as possible, but also take the time to insure everything is accurate.

- ✓ Form(s) W-2 (wages, etc.)
- ✓ Form(s) 1099 (interest, dividends, etc.)
- ✓ Schedule(s) K-1 (income/loss from partnerships, S corporations, etc.)
- ✓ Form(s) 1098 (mortgage interest) and property tax statements
- ✓ Brokerage statements from stock, bond or other investment transactions
- ✓ Closing statements pertaining to real estate transactions
- ✓ All other supporting documents (schedules, checkbooks, etc.)
- ✓ Any tax notices received from the IRS or other taxing authorities

I will copy and return any original documentation you provide me.

All tax returns are required to be filed electronically. If you have any questions or concerns about efilings, please let me know.

Thank you for the opportunity to prepare your tax return for 2023.

If you have any questions, please feel free to call or email me.

Sincerely,

A handwritten signature in black ink, appearing to read 'Pat Kolodziej', written in a cursive style.

Pat Kolodziej, CPA, MST

Enclosures