



Dear Client,

If you have not received your tax organizer yet in the mail, please be advised that they are on the way within the next couple of weeks. We inadvertently sent out an eblast yesterday stating that you should have received your tax organizer by now. Although it is our policy to get all organizers by the third week of January, this did not happen this year and we are sure you understand the challenges we all face during these unprecedented times. You should be receiving your organizer by the end of January. Feel free to reach out to our office if you have not received the organizer by Feb 5th and would like it to be resent to your address or a pdf version emailed to you instead. In the meantime, we ask that you send us all supporting documents electronically through **ShareFile** whenever possible. **ShareFile** is our preferred method to securely send and receive files. Please avoid emailing us your confidential information since it is very vulnerable to cyberattacks.

If you have an existing **ShareFile** account with us, please log in at krostopas.sharefile.com. Otherwise, click on the link below to upload any documents you wish to send to us.

All necessary information must be received by us no later than March 1st, 2021. Information not received timely will most likely result in the filing of an extension of time to file your returns. As you can imagine, this time of year is very busy. While we strive to complete all returns by April 15th, it is not possible when too much of the work is left until the last few weeks. We are asking for your help in giving us your tax information as soon as possible by our March 1st deadline.

Please send us the following information:

Tax Organizer: Once you have received your organizer by mail (unless you have previously informed us you do not need one), be sure to note any changes over the prior year to your address, marital status, number of dependents, job changes, etc. We no longer provide an electronic tax organizer. Please contact our office if you prefer a pdf version.

Signed Tax Engagement Letter: This form is included in your organizer package. Please make sure it is signed before returning it to us. We will email you another one if we do not initially receive this.

Tax source documents and forms: Please be sure you send us all necessary tax documents and forms needed to prepare your return.

Get started today: [Click here](#) for secure file upload.

We look forward to working with you again this year and if you have any questions, please feel free to contact our office.

Sincerely,

KROST CPAs & Consultants

Contact us if you have any questions or concerns about the tax organizers.

[CONTACT US](#)

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