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Friday, January 13, 2012

Dear Taxpayer,

Happy New Year, we hope that your holidays were enjoyable. Another tax season is here and we are busy preparing.

There have been many tax changes for 2011. In addition, there have been a few carryovers that we did not expect. For instance the **American Opportunity Credit**. Please see the enclosed "**12 Tempting Tax Tips for 2012**", for more information and the included "**What's New**" page.

Please use the "**Tax Tips**" and any checklists included with this letter; they can save you time and money in preparing for your tax appointment. We request that you provide **written totals** (not verbal) for your deductions, including charitable contributions, medical expenses, business expenses, etc. This also includes written totals for utilities for anyone who has an office-in-home. If you have need of other checklists you can find more on our website: <http://www.taxwiz123.com> along with a really nice fill-in tax organizer or telephone the office and we will be happy to mail you one. If you want **direct deposit**, please provide us with the name of your bank, routing and account number, and whether it is checking or savings (a copy of a check is preferred). Our **\$10 Referral Discount** to those who recommend us to others; you will **receive \$10 off** the cost of next year's tax returns.

Remember you can deduct your tax preparation fee directly from your refund. We can direct deposit your refund or print a check here and take our fee out of it – there is a \$35 charge for this service.

Our tax appointments always fill up fast so make sure you schedule yours as soon as possible. Please feel free to contact us with any questions you might need answered before coming in to our office.

As always, we are looking forward to seeing you.

Sincerely,

Lori L. Grubb, E.A.