Currie
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Certified Public Accountants

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To Our Clients:

As always, our firm continues to work diligently to prepare for the upcoming 2022 tax filing season. As we've all experienced, COVID-19 has substantially changed how we conduct business and go about our daily lives. We now have three options available for the preparation of your tax return:

1. **In person appointment in our office**. This is usually the best option if you have questions/items you'd like to discuss, or things that have changed from the prior year.
2. **Online virtual or phone appointment at a scheduled time**. We encourage you to choose this option or drop off your information if you feel that has worked well for you in the past couple of years.
3. **Drop off/upload your information** and we will contact you with questions/when it's complete.

Please note that our office has moved! We are now located at 539 Main St. S.

Scheduling Your Appointment

If you would like an appointment in our office or a virtual/phone appointment at a scheduled time, please call our office to schedule your appointment.

For virtual/phone appointments, your tax documents need to arrive in our office one week prior to your reserved date/time. For those of you who live close by, it will be easiest for you to drop off your tax information at our office. If you are unable to drop off your information, you can send it to us in the mail, or send us a secure email. If you would like to send us your documents via email, please email your preparer and they will send you a secure link to upload the documents directly to them.

If you have investments, please be aware that your time slot will likely be scheduled for a date after March 15^{th}, as many investment companies are notorious for sending out corrected 1099s as late as March 15^{th}.

Gathering Your Tax Information

Listed below are tips on gathering your tax information:

1. **Complete the following enclosed documents and bring with along with your tax documents (please do not send us this information in advance):**
   - Engagement Letter – must be completed & signed
   - Client Information Checklist – must be completed, especially driver's license info and dependent info.
   - Dependent Checklist – must be filled out only if you are claiming dependents on your tax return

2. **Include all tax forms and documents you've received.** If you are unsure of which documents to bring, look back at previous years' returns and go through the documents section for guidance. Note and research any differences and provide us a reason for changes.

   Please remove the items from the envelopes to save us time in opening your mail. This will reduce the chance of missing documents or bringing unnecessary items.

If you have purchased or sold real estate during the year, the closing statement is required to prepare your return.

3. **Visit our website (www.CMAssociatesLtd.com)** to download tax organizers you may need. Feel free to spend some extra time browsing our website and the related links for some great tools and a wide variety information on various tax and accounting topics. For those with limited access to the internet, please call or stop into the office for copies of any organizers you may need.

4. **Small Businesses/Rental Activities** - please be sure your income and expenses are summarized by category. Our organizers on our website are very helpful in summarizing the income and expenses. Be advised that you may be charged an additional fee if extra time is necessary to complete your return due to missing documentation or forms, individual income or expense items not organized and subtotaled, etc.

5. **Let us know what has changed** – if you got married or divorced during the year, had changes in dependents (new baby or foster child; child attending college), moved to a new address, or started or closed a business, etc., please be sure to let us know this important information on the enclosed client information checklist.

6. **Please make sure your information is complete** to avoid delays in your return preparation. If you are missing information, it can take some time for us to find another available time slot to finalize your return.

Our Associates & Email Addresses

- Krista Currie, CPA, EA – kristac@cmassociatesltd.com
- Krista Myers, CPA, EA – kristam@cmassociatesltd.com
- Peggy Jensen, CPA – peggyj@cmassociatesltd.com
- Kimberlee Bever, EA, RAP – kimberleeb@cmassociatesltd.com
- Terry James – terryj@cmassociatesltd.com
- Rose Frye – rosef@cmassociatesltd.com
- Sam Bergman – samb@cmassociatesltd.com

Changes Taking Place in Our Firm

We've welcomed Samantha Bergman as our new office manager this summer. Heather Cortez decided to leave MN to live in sunny and warm Florida instead!

Finally, please be aware that almost all clients will experience a fee increase this year. While we strive to keep fees reasonable for all, we also have to balance that with the ever-increasing costs of technology (including software, hardware, data security, etc.) combined with the additional time needed to complete returns due increased complexities. Thank you for your understanding in this matter. We appreciate your patronage, and we strive to make your tax preparation process as painless as possible.

Regards,

The Staff at Currie, Myers & Associates, Ltd.