

Peachtree Tax Advisors, LLC

500 East 2nd Street
Rome, Georgia 30161-3112
www.PeachtreeTaxAdvisors.com

DR. LAMAR BARDEN
Lamar@PeachtreeTaxAdvisors.com

Office: 706-234-7468
Fax: 706-234-0099

PLEASE READ

Enclosed is the Tax Organizer we recommend you use to collect important data so that we can properly prepare your Federal and State Income Tax Returns. **Please do not assume we have your most up-to-date personal information in our files.** It is important that you give us your current contact information so that we may communicate with you if needed to clarify your tax return information. This will help to maximize your tax deductions, ensure accuracy in your tax return and minimize the time it takes to complete your return.

We hope you will visit our website at www.PeachtreeTaxAdvisors.com to view various calculators and information that will be helpful to you throughout the year. We constantly update our website with resources that will help you in numerous areas of your finances. Let us know if there are items you would like for us to address on our website that would be helpful to you!

As an added convenience, **you now have the option to pay online for your tax return preparation.** Simply visit our website and click on [Make A Payment](#) for this option. This is a secure site with encryption so you can feel safe knowing your credit card information is protected.

As you collect your data for the tax returns please send us all W-2's, Form 1099's, and any other items you think might be important. If you are unsure, don't hesitate to call or email us with questions, receipts, or other documentation and we will review to verify if it is something that needs to be reported. **IRS Requirements: You must have documented proof of all income and deductions reported on your tax returns. This documented evidence generally must be in written form, such as receipts, cancelled checks, or bills to support your income and deductions.**

A few changes this year: In lieu of the increased prices in supplies, computer software/hardware and overhead, you may see an increase in your tax preparation fee. Please contact us if you have any questions.

We are available anytime to answer your questions or help with any matter relating to your tax returns. Tax Season is very busy, however, we will do all we can to return your call or answer your emails in the most timely manner. Please do not hesitate to contact us if you need assistance. All of our contact information is listed at the top of this page.

We look forward to helping you this tax season.

Sincerely yours,

Dr. Lamar Barden