Personalized Tax Preparation for Over 25 Years

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Season's Greetings

Dear Clients:

I hope that all is well with you and that you've enjoyed a prosperous year. This is WRS' very first Annual Client letter. I am writing to inform you of the upcoming changes that will be effective for the in 2017 tax season. Let me THANK each and every one of you for your continued patronage. As for my new clients, WELCOME !

Looking back over the past years, I have observed several things, the number of clients that I serviced, the processes I used in preparing your returns, and the special care and personal attention I given to each and every client. I also examined the number of hours I worked versus my family life, and my quality of health.

I also spent some time examining the increased IRS responsibilities and requirements for tax professionals, the fiscal outlay of enhancements monies invested in training, purchasing of equipment/software, and the hiring of additional support staff to assist with processing your return. In my study, I have found some imbalances. The greatest concern is that WRS is billing far below industry standards. It is with great difficulty that I've decided to raise my fees on an average increase of 25% higher than your prior year fee.

I felt compelled to share this information with you prior to the New Year. I wanted to inform you of this change , in advance so that you would not be surprised later. It is my hope that you know I will continue to provide the same level of service exchange, and know that your continued patronage of WRS Tax & Financial services is greatly appreciated.

I have many clients that come prepared every tax season. They require minimal additional effort on my part. For that client, the next section is not for you. Please move forward to the next paragraph. However, in the past, I have pampered many of my clients. For this, I do bear the guilt. Unfortunately, the pampering increases the time I spend preparing taxes. Here are few problem areas that I've identified: (1) missing information and tax documents, (2) blank noncash donation slips, (3) incomplete summaries of income and categorized expenses of: Schedule C (side business activity), Schedule E (rental activity), and form 2106 (unreimbursed work-related expense) summaries, to name a few .

What's new this upcoming 2017 tax year is as follows:
the following:

- ❒ New this year is a client checklist that each client will need to complete and sign prior to your visit. Please download the form from the website and include it in with your tax documents.
- ❒ Noncash donation slips will need to be dated along with a brief description of items and a value of the donated items on each slip.
- ❒ Schedule C, Schedule E, and form 2106 summaries of income & categorized expenses please check my website for helpful worksheets and excel spreadsheet that may be helpful or prepare your own categorized summary.

I am suggesting to all of my clients to take a moment and review your returns from prior years to see if you are including all the necessary documents and backup needed to complete your return as this will be a great help to me in completing your return accurately.

In closing, it is my hope that these changes will streamline things so that your tax preparation time is shortened. As always I want to THANK YOU again for your loyal support and continued patronage of WRS Tax & Financial Services. Please know that we remain on standby to ensure that you continue to receive high quality tax preparation services, with accurate and favorable results.

Sincerely,

W. R. Strother, III