

**Rom Gilbert, CPA
PO Box 1990
Keystone Heights FL 32656
352-473-3332
January 2, 2024**

«First_Name» «LastName»
«Address_1»
«Address2»
«City», «State» «Postal_Code»

Dear «First_Name»,

The mailing address and phone number are listed above. My email address remains romcpa@romgilbert.us. We hope to receive your tax info before the end of March.

[1] Your client checklist is enclosed. Use this checklist to see what is to be provided to me. Cross out any tax information that should be deleted. Some of you have been great in updating your checklist.

[2] The 2023 Form 1040 Tax Information page is enclosed. Check it out. Additional related information is available.

[3] Please let me know of any changes such as address, telephone number, dependents (child tax credits), direct deposit account numbers, email address, etc.

[4] Keep phone messages short but speak your phone number slowly. State your name and phone number twice. If I fail to the call back within 24 hours, call again. I may not answer the phone if I don't recognize the number or name.

[5] If you receive a letter from the IRS, get a copy to me as soon as possible. It is difficult to win a case if we don't respond.

[6] Filing your return early is one way to protect against identity theft. If you receive a PIN from the IRS, please provide it to me. When provided, this 6-digit number is required to e-file your tax return.

[7] For taxpayers who want to talk to me live and in color, I will do so. If specific information is not provided in this mailing, call, text or email me.

[8] The tax deadline for individual income tax returns is April 15, 2024. I have other responsibilities from early April through October but will find time to (a) answer your questions and (b) respond to IRS letters received by clients.

[9] We can please some clients all of the time. We can please all clients some of the time. But we apparently can't please all clients all of the time. However, we give it our best shot.

Please check website romgilbert.us for relevant information (e.g. tax changes) and for updates.

Sincerely,

Rom