

CAIN, BOURRET, JARRY & CRESSMAN LLC

CERTIFIED PUBLIC ACCOUNTANTS

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December 2023

Dear Client:

We trust you had a wonderful holiday season. As we look forward to 2024, we wish you and your family good health, happiness and success in the New Year and always.

Tax Season is quickly approaching, and we would like to advise you of our office hours for the busy season. Currently, our office hours are Monday thru Friday from 8:30 am to 5:00 pm. Beginning February 5, 2024; we will add Monday thru Friday evening hours from 5:00 pm to 7:30 pm and Saturday hours from 9:00 am to 3:00 pm. You may drop-off /mail-in /e-mail /fax or upload to our Client Portal all your tax documents. Or you may call the office to schedule a face-to-face appointment. Many of our accountants will be having appointments. Others will continue with the drop-off process.

*If you drop-off, please be sure to include your current address and phone number.

*If you mail-in your materials, consider sending your packet with a USPS tracking number.

*If you e-mail, please white out all SSNs and e-mail to officemanager@cbjv.com, or look up your accountants' e-mail address on the About Us tab of our website.

*If you fax your documents, please use a cover sheet and indicate the total number of pages you are sending and fax to 978-957-3480.

* If you upload to the Client Portal, please note that we will be notified that you have uploaded your documents, but it is still very helpful if you let us know when you think you have finished uploading everything. And, if you want to use the Client Portal for the first time; please call the office at 978-957-1421 for an e-mail invite.

The team at Cain, Bourret, Jarry & Cressman LLC is not only ready to help you navigate filing your return smoothly; we are here for you all year long. Our team of experts can guide you to achieve personal and business success. Whether you need tax preparation, tax planning, auditing, bookkeeping, business consulting or financial advice; our team is ready to work with you.

Please refer to our *Tax Prep Documents Checklist for 2023 Tax Returns*, listed on the Home tab of our website, as you assemble your 2023 tax information. It is a comprehensive list of income sources and expenses, so many items will not apply to most of you. The list is designed to remind you of the kinds of things you should provide for your individual tax preparation.

Looking forward to hearing from you soon,

Steven R. Bourret

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