



Integrated Tax Consultants, LLC

358 US Route 1, Suite 101 • Falmouth, Maine 04105

Dear ITC Client,

Greetings from our team here at ITC and Happy New Year! We hope that 2024 was a prosperous year for you and your family and hope that we can be of service to you towards that end. As it is now the season for getting organized and prepared for your 2024 tax return filings, we have included important materials to help you do just that.

Please find enclosed your 2024 Individual Tax Return Engagement Letter for you to review, sign, and return to us to initiate this year's individual tax return preparation. Also included is our Personal Income Tax Checklist, which is essential to ensure that we have a full understanding of your tax-related events and circumstances to enable us to prepare your 2024 returns correctly and efficiently. **This checklist is required.**

Also available is a personalized Tax Organizer to assist you in gathering your tax documents and other records we need from you to prepare your return. This organizer generates using last year's information and it is a fantastic tool. Should you wish to receive the Tax Organizer and it is not enclosed in this packet, please let us know as soon as possible.

To allow us sufficient time to prepare and review your 2024 Individual Tax Return(s) to meet the IRS deadline of April 15th, 2025, **we need to have all of your individual tax materials, including your completed & signed checklist and signed engagement letter, no later than Monday, March 10th, 2025.** If we do not have most of your materials by this date, we will most likely need to extend your tax return. Please remember that extensions of time to file do not extend the time to pay any tax you may owe.

ITC is excited to announce our merger with Stan Gavitt and his practice! Stan is a CPA based in Portland with decades of accounting experience who has maintained his own private practice since 2002. To Stan, and to his clients who will follow him on his journey with ITC, we offer a warm welcome!

As a reminder, upon completion of your return, we will provide you with a copy for review along with an invoice for its preparation. Prior to filing the return on your behalf, we do require payment in full for our services. To make this process as streamlined as possible, we have enclosed an ACH (Automatic Clearing House) Form that will enable us to process payment on your behalf from your bank account once you have reviewed your return and invoice and confirmed that you are ready for it to be filed. Should you have any questions about this, please let us know.

We are excited to work with you and appreciate your confidence in us and look forward to hearing from, or seeing, you soon.

Please feel free to contact us anytime.

Sincerely,

Integrated Tax Consultants, LLC