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January 8, 2018

All of us at Hendricks Financial Services hope you had a wonderful Holiday Season! With the coming of the new year, it's time to get geared up for the 2017 tax season!

You may have heard something about the new tax bill that Congress passed in December. The vast majority of the changes made DO NOT impact your 2017 tax return. We will be discussing some of the changes at our Client Appreciation Event on January 11, 2018 and will talk through how these changes will specifically impact your tax situation when we review your 2017 return.

To help us prepare your 2017 return, please complete the attached 2017 Tax Organizer and return it to us with your supporting documentation by **MONDAY APRIL 2, 2018**. This will ensure that we will be able to prepare, analyze, review, audit, deliver, and file your return before the filing deadline of April 17, 2018.

We have enhanced our processes to allow for better electronic / digital communication and sharing of information, starting with our 2017 Tax Organizer. The 2017 Tax Organizer has been re-designed to allow you to either complete it electronically or in paper, as we have done in the past. Due to this enhancement, it may take some operating systems extra time to open the document.

To complete the Tax Organizer digitally, please open the Word version of the attached 2017 Tax Organizer:

- Enable Macros. If you don't have Macros normally enabled on your computer, there will be a pop up in Word asking if you would like to Enable Macros when you open the document.
- Click in and type in the boxes and / or click on the appropriate answers where necessary. *If you need additional pages for Rental Properties or Self Employment, please let us know and we will get those to you ASAP.*
- Once your organizer has been completed, save it as a pdf.
- Scan all of the tax documents you have received.
- Email your completed organizer and all documents to [don@hendricksfs.com](mailto:don@hendricksfs.com).

If you prefer to complete the Organizer in hard copy, please print the attached .pdf version of the Tax Organizer and provide us with paper copies of your tax documents. We strongly encourage you to print only the pages that are necessary and to print on both sides of the paper.

Finally, we will have the ability to process debit / credit card payments for our tax preparation services this year! If you would like to take advantage of this service, there will be a 3% processing fee for all debit / credit cards (this is what our processor is charging us). As always, we will continue to accept checks or cash.

We sincerely appreciate the trust that you place in us to prepare your taxes and would like to thank you for the opportunity to do so again this year.

*Lynn & Don*