

Dear Clients and Friends,

We wish you all a healthy and prosperous new year. We're pleased our newlywed daughters Kaycee and Kennedy, both licensed, are returning to assist us with our heavy workload. This year we welcome Kennedy's husband Alex to the team, replacing Kaycee's husband Joshua who landed a great job with Tax Relief Advocates.

Appointments, Mail, E-mail : We're currently scheduling face-to-face appointments 7 days a week on a limited basis. Steve's reducing face-to-face appointments and encouraging his clients to mail, e-mail, fax or drop off their documents. Clients who do so will receive a phone call to review their return before finalizing. All returns will be processed in the order they are received except rapid refunds. **Please don't send your documents to more than one e-mail address.** When e-mailing docs, please only send to info@casablancatax.com or the preparer's email address at bottom of page.

Health Insurance: Anyone with **Covered California** even for a month must provide us with form 1095-A before we can submit return.

Receive a IRS or Ca letter? If you received an IRS or CA State notice and have questions, please e-mail a copy of the notice to your tax preparer for review. Please include a good contact number, then we will call to discuss at earliest convenience.

Rapid Refunds: \$125 bank charge. Want tax prep fees deducted and refund asap? Mail-in returns are usually prepared within 5 days with a \$125 bank charge also deducted from refund.

Dave Ness is our Realtor/ Mortgage & Real Estate consultant. Buying a house, questions about refinance estate, reverse mortgages, equity lines, call Dave! He has more than 25 years' experience in Real and is looking forward to providing you with the same professional service you are accustomed to.

All completed returns are COD and must be paid for prior to e-filing. We accept Zelle, checks, cash, and major credit/debit cards.

Office Hours: M-Friday 8:00 am to 7:00 pm. Saturdays and Sundays 8:00 am to 4:30 pm.

Questions for tax preparer? Please e-mail to: Steve@casablancatax.com , Roni@casablancatax.com, Laura@casablancatax.com, , Tommy-tfish1@gmail.com , Sandra@casablancatax.com, kennedi@casablancatax.com, David-dnesshomeloans@gmail.com

Sincerely,

Steve and Roni Lopes