



pennoptic

CPAs and Strategic Partners LLC

January 6, 2025

Dear Valued Customer,

I wanted to take a few moments to wish you and your family a happy, healthy, and prosperous new year and to thank you for your support as we define the future of Pennoptic CPA's and Strategic Partners. Our goal is to create a team that can serve the accounting and finance needs of you, our customer, in an increasingly sophisticated and evolving accounting and financial services market.

We want you to feel like you have an in-house chief financial officer to help you make the best decisions possible. It has always been the case that you could make better decisions with better information. Staying on top of this information has been made more challenging by the rapid evolution of technology and the speed of change.

There are not a lot of obvious tax law changes for 2024 taxes but as usual the devil is in the details. Our team is aware of the details and will work to make sure that you don't miss any of the write-offs available to you. There can be a big difference in the accounting and finance world between doing it right and doing it wrong - in time, money, and results, not to mention regulatory scrutiny.

We want Pennoptic to be your trusted partner as you make decisions. Whether it's buying a house, buying a business, funding education for your kids, or planning for retirement, we can help. We have tax expertise to address any tax need that could come your way including trusts, estates, and non-profits.

Our team primarily services clients in Lancaster, Berks, Lebanon, York, and Cumberland Counties, however, we have clients throughout the United States. We also have a network of attorneys and financial professionals partnering with us to expand the network of professionals available to you.

The enclosed documents will give you the information we need to process your 2024 tax return. The last attachment is the bio's for the local office team. Most of our team are names that you are familiar with, but we have added some great new team members who may also be working with you. Join us in welcoming them to the team.

Again, best wishes to you and your family as we head into 2025. The future is now: let's head there together.

Jeffrey S Bleacher, CPA

Managing Partner

Pennoptic CPAs and Strategic Partners, LLC



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CPAs and Strategic Partners LLC

January 10, 2025

Dear Valued Clients,

Thank you for entrusting Pennoptic CPA's and Strategic Partners with the preparation of your 2024 tax return. Fortunately, 2024 is a year where we will not be seeing a lot of changes to the existing tax law. This is allowing us to implement some new systems and processes designed to improve the efficiency of internal workflows and provide returns in a timelier manner with the delivery method of your choosing. We hope these changes will better prepare us for tax law changes we expect in the future.

A Note on Pricing

Recent years have brought with them ever increasing costs of providing high quality tax services to you. Our goal is to always provide the highest quality tax returns at a fair market price. As a result, you may see an increase in the cost of your tax return. We are doing everything we can to try and keep these increases as reasonable as possible.

***\$395** will be the minimum fee to prepare a federal, state, and local income tax return for all new and returning clients. There are some **limited** exceptions for dependent children, amended returns, and some individual returns associated with business entities.*

We understand there may be firms willing to prepare your return for less than we are able, and we absolutely respect any decision that you make. Our goal is to provide fair and equitable pricing to all our clients at the high-quality level that they deserve.

Tax Season Office Hours

Our tax season hours have changed from last year. Following are the hours for each office:

Willow Street – 8:00am to 5:00pm Monday through Friday, 8:00am to 12:00pm Saturday

Carlisle – 10:00 am to 5:30pm Tuesday, and Thursday

Palmyra – 9:00am to 4:30pm Monday through Friday (ask for Niki or Darla) or put your tax information in the basket on Darla's desk.

If these times are not convenient for you, please call the office and we are happy to schedule an off-hours time.

Information for Pennoptic to Process Your Return

There are three additional documents that are included in this correspondence. The first two of these forms need to be signed and returned with your tax documents before we will begin to process your return.

Attachment 1: Tax Return Drop Off Information Form.

This form is instrumental in helping our preparers reduce the amount of questions required to properly prepare your individual tax return. Please be sure to fill out this form completely as some of the questions have changed from last year, particularly, how you want to be notified when your tax return is complete and what medium you would like to use to receive your copy of the tax return.

Attachment 2: Individual Income Tax Return Engagement Letter

The second attachment is our engagement letter. This letter defines our working relationship with you. This year's engagement letter has some minor changes related to regulatory interpretations and to assure consistency throughout Pennoptic.

Attachment 3: Electronic Submissions of Tax Filing Data

Electronic submissions are our preferred method to receive information. This is accomplished by using the Pennoptic Portal. If you are unfamiliar with this process, instructions are provided in **Attachment 3**. The portal is monitored in real time, and our staff can answer any questions you may have if you are new to this service.

Due to inconsistency in photo clarity, pictures of documents will no longer be accepted.

Email is not a secure method of document exchange. Pennoptic will not be responsible for any interference that is the result of any information transmitted to us via email.

Clients who drop off their documents should expect to spend up to 15 minutes with our front office staff so we may properly collect the information we need from you. If you have a unique situation or question that would require clarification before we start to work on your return, please work with our admin staff to schedule a time for one of our preparers to call you to better understand the situation and whether additional information will be required.

Both the Willow Street and Carlisle offices have a drop box if you would like to drop off your tax information outside of business hours. In Willow Street, the drop box is located in front of the West entrance overhang. In Carlisle, the drop box is located on the north side of the building. Any information mailed through the U.S. Postal Service must use our Willow Street address, which is 212 Willow Valley Lakes Drive, Suite 202, Willow Street, PA 17584.

Attachment 4: New Team Members Bios

We have included a brief bio to introduce our new team members to you. They all look forward to meeting with you and assisting you with your tax needs.

Pennoptic Tax Season Deadlines

This year's tax deadline is April 15th. Individual tax returns for which we have all information necessary to complete the return by March 21, 2025, will be filed by the tax deadline, pending unforeseen issues. When information is received after March 21, 2025, we will make our best effort to complete the return by the due date – do not assume that we will be able to complete and file your return by April 15th. If we determine that your return cannot be completed by April 15th, we will contact you to notify you that we will be filing an extension on your behalf.

If you would like our office to prepare Form 1099, Form W-2, or Form 1098 we request all reporting information be provided to our office no later than January 13th for completion by the January 31st deadline. We encourage you to call the office if you are not sure whether reporting requirements apply to your situation. Small businesses who pay wages, subcontractor labor, business property rent, or business interest may have a reporting requirement they are unaware of. These requirements do not usually apply to individuals who are not self-employed and do not have a business entity. All existing clients to whom this applies should already be aware of this requirement.

If we do not have your signed e-file authorization forms to us by April 11, 2025 your return will be placed on extension and you may incur additional fees. Related to this you want to ensure that any payments that you owe, to any of the jurisdictions, are made in a timely manner. We received many letters from the state last year as they became more aggressive about assessing late payment charges.

Your Copy of Your Tax Return

You have three choices for receiving your copy of your tax return. 1) You may pick it up at our office. 2) The return can be mailed to you – in this case we will apply a \$15 charge to your invoice. 3) Electronic delivery through the portal – see instructions in Attachment 3 to access the portal.

Payment

Generally, payment will be made for your return when you pick up the return. Payment can be made by cash, check, or credit card. When paying by credit the payment can be made online via our website, and you can either do this yourself or have a member of our staff do it for you (the credit card company will add the processing charge to the amount of your invoice). This process is a change from what was done during last year's tax season.

Thank You

Thank you for allowing us to do this important work for you. We sincerely enjoy working with all our clients. If you have any questions, please do not hesitate to call - we are here to serve you and look forward to seeing you soon.

Best wishes for a wonderful year!

The Team at Pennoptic CPAs and Strategic Partners



2024 – TAX RETURN DROP-OFF INFORMATION FORM

Print Name _____ Signature _____

Email Address (Prefer to receive emails) _____ Secondary Email Address _____

Primary Phone # (Prefer to receive calls) _____ Secondary Phone # _____

- | | <u>Yes</u> | <u>No</u> |
|---|--------------------------|--------------------------|
| 1) Did anyone listed on your return (you, spouse, dependents) use the <u>Government Marketplace</u> for health insurance during 2024?
If yes, you must provide us with Form 1095-A . | <input type="checkbox"/> | <input type="checkbox"/> |
| 2) Are you dropping off tax documents for additional parties (i.e. parents, a child, In-laws, etc.) that will require a separate tax return to be filed?
If yes, please list their names below:

_____ | <input type="checkbox"/> | <input type="checkbox"/> |
| 3) Did your marital status change during 2024?
If yes, explain: _____ | <input type="checkbox"/> | <input type="checkbox"/> |
| 4) Did you move during 2024? If so, please provide your new address and date of move _____
_____ | <input type="checkbox"/> | <input type="checkbox"/> |
| 5) Are you claiming any dependents for 2024? If no, skip to question #6. If yes, complete A, B and C. | <input type="checkbox"/> | <input type="checkbox"/> |
| A) Is there any change to the status of any dependents?
If yes, explain: _____
<small>If you are adding a new dependent, please provide a <u>copy</u> of the birth certificate and social security card.</small> | <input type="checkbox"/> | <input type="checkbox"/> |
| B) Did all dependents live with you for more than half of 2024?
If no, explain: _____ | <input type="checkbox"/> | <input type="checkbox"/> |
| C) Did you provide over half the support for all your dependents?
If no, explain: _____ | <input type="checkbox"/> | <input type="checkbox"/> |
| Can another person qualify to claim any of your dependents?
If yes, explain: _____ | <input type="checkbox"/> | <input type="checkbox"/> |
| E) Did you pay anyone for childcare services?
If yes, please provide receipt with amount, EIN/SSN and address . | <input type="checkbox"/> | <input type="checkbox"/> |

6) If you receive a refund, would you like a direct deposit? Yes No
 Banking information **DID NOT** change
 If your banking information **changed**, please provide the following:
 Bank Name: _____
 Routing Number: _____
 Account Number: _____
 Account Type (Checking or Savings): _____

7) Are you claiming an education credit? If yes, you must provide us with the Form 1098-T, Tuition Statement from the educational institution and the student's account statement from the college showing the payments made.

8) At any time during 2024, did you: (a) receive cryptocurrency as a reward, award, or compensation; or (b) sell, exchange, gift, or otherwise dispose of a digital asset (such as bitcoin), Foreign Assets or Foreign income?

9) Did you make any contributions to an IRA/HSA/529 Plan?

10) Did you make qualifying energy-efficient improvements to your home, which may include items such as windows, solar panels, water heaters, or furnaces?
 If yes, please provide invoice(s) with make, model, and amount paid

11) Did you purchase an electric vehicle?

12) Did you receive income from renting a house or property?

13) Did you receive income from self-employment?

14) Did you receive a 1099-K from eBay, etc. related to selling property online?

15) If you made estimated tax payments for 2024, please provide the dates and amounts paid below.

FEDERAL <small>(Date/Amount)</small>	STATE <small>(Date/Amount)</small>	LOCAL <small>(Date/Amount)</small>
1. _____	1. _____	1. _____
2. _____	2. _____	2. _____
3. _____	3. _____	3. _____
4. _____	4. _____	4. _____

16) Please provide any significant changes that we should be aware of for 2025:

Preferred method to communicate your return is ready for pick up:

Call Email

Preferred method of pick up: PICK UP MAIL ELECTRONIC COPY



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CPAs and Strategic Partners LLC

Dear Valued Client,

We appreciate the opportunity to work with you. To minimize the possibility of a misunderstanding between us, we are setting forth pertinent information about the services we will perform for you.

Tax Services

We will prepare your 2024 federal, state, and local (if applicable) individual income tax returns from information you furnish us. To assist you in gathering and organizing the necessary information required for the preparation of your individual income tax returns, we will furnish you with a tax questionnaire. Providing us with the completed tax questionnaire will help to ensure that you are not overlooking important information that may be necessary for complete and accurate returns, as well as may help to minimize our fees.

We must receive all information to prepare your returns by March 21, 2025, to ensure that your returns will be completed by April 15, 2025. If we have not received all of your information by March 21, 2025, we cannot guarantee that your returns will be completed before the deadline. If we are unable to complete the returns, we will prepare an extension of time to file your returns. If you do *NOT* want us to prepare a protective extension on your behalf, you must notify us in writing before the above deadline. You should keep in mind that this would be an extension of time to file the returns; but any tax estimated to be due would need to be paid with the extension request. We assume no liability for late filing or late payment penalties.

You are confirming that you will furnish us with all the information required for preparing the returns. This includes, but is not limited to, providing us with the information necessary to identify (1) all states and foreign countries in which you "reside" (even on a temporary basis), "do business" or derive income (directly or indirectly) and (2) the extent of business operations in each relevant state and/or country. We will not audit or verify the data you submit, although we may ask you to clarify it or furnish us with additional information. You should retain all the documents, books, and records that form the basis of your income and deductions. The documents may be necessary to prove the accuracy and completeness of the returns to a taxing authority. If you have any questions as to the type of records required, please ask us for advice in that regard.

Please note the Internal Revenue Service ("IRS") considers virtual currency (e.g., Bitcoin) and other digital assets (e.g., NFTs) as property for U.S. federal tax purposes. As such, any transactions involving cryptoassets or transactions that use or exchange virtual currencies are subject to the same general tax principles that apply to other property transactions. If you had any cryptoasset or virtual currency activity during the 2024 tax year, you may be subject to tax consequences associated with such transactions and may have additional foreign reporting obligations. You agree to provide us with complete and accurate information regarding any transactions in cryptoassets or transactions using any virtual currencies during the applicable tax year.

We will use our professional judgment and expertise in preparing your return(s) given the guidance as promulgated at the time our services are rendered. Subsequent changes in law, regulatory rulings, or interpretations by the applicable taxing authorities may affect the information we have previously provided, and these effects may be material. Whenever we are aware that a possibly applicable tax law is unclear or that there are conflicting interpretations of the law by authorities (e.g., tax agencies and courts), we will share our knowledge and understanding of the possible positions that may be taken on your return(s). In accordance with our professional standards, we will follow whatever position you request, as long as it is consistent with the codes, regulations, and interpretations that have been promulgated.

If a taxing authority should later contest the position taken, there may be an assessment of additional tax, interest and penalties. We assume no liability for any such assessment of additional tax, penalties or interest. In the event, however, that you ask us to take a tax position that in our professional judgment will not meet the applicable laws and standards as promulgated, we reserve the right to stop work and shall not be liable for any damages that occur as a result of ceasing to render services.

The law provides for a penalty to be imposed where a taxpayer makes a substantial understatement of their tax liability. Taxpayers may seek to avoid all or part of the penalty by showing (1) that they acted in good faith and there was reasonable cause for the understatement, (2) that the understatement was based on substantial authority, or (3) there was a reasonable basis for the position taken on the return and the relevant facts affecting the item's tax treatment were adequately disclosed on the return. You agree to advise us if you wish disclosure to be made in your returns or if you desire us to identify or perform further research with respect to any material tax issues for the purpose of ascertaining whether, in our opinion, there is "substantial authority" for the position proposed to be taken on such issue in your returns.

If your individual return includes business activities, you may be required to collect and remit sales taxes. In addition, if your business has employees working remotely in another state or foreign country, even on a temporary basis, your company may be viewed as having "nexus" in that location for tax purposes and may be obliged to pay additional franchise, income, sales or use tax, payroll, or other business tax, and to comply with other tax or reporting requirements.

As our engagement is limited to preparing the income tax returns specified above, our firm is not rendering any services designed to assess your sales and use tax risks and potential exposure to substantial ("economic") nexus. By your signature below, you understand and acknowledge that you are responsible for compliance with applicable laws in the respective jurisdictions in which you do business. If you require our assistance to assess your potential tax exposure, please let us know. Any additional services will be covered under a separate engagement letter.

Starting in 2024, the Corporate Transparency Act ("CTA") mandates certain entities (primarily small and medium-size businesses) created in or registered to do business in the United States report information about their beneficial owners -- the individuals who ultimately own or control a company -- to the Financial Crimes Enforcement Network ("FinCEN"). If your individual return includes a business, you are responsible for compliance with the CTA, if applicable, and for ensuring that any required reporting of beneficial ownership information is timely filed with FinCEN as required by the CTA. Our firm's services under the terms of this agreement do NOT include any advising, consulting, or submission of any required reporting related to your compliance with the CTA.

If you and/or your entity have a financial interest in, or signature authority over, any foreign accounts, you may be subject to certain filing requirements with the U.S. Department of the Treasury, in addition to the IRS. Filing requirements may also apply to taxpayers that have direct or indirect control over a foreign or domestic entity with foreign financial accounts, even if the taxpayer does not have foreign account(s). The foreign reporting requirements are very complex, so if you have any questions regarding the application of the U.S. Department of the Treasury or the IRS reporting requirements to your foreign interests or activities, please ask us for advice in that regard. We assume no liability for penalties associated with the failure to file or untimely filing of any of these forms.

Taxing authorities require us to electronically file all federal and state individual income tax returns ("e-filing"). However, you do have the right to "opt out" of the e-filing program. Please notify our firm immediately should you desire not to have your returns e-filed, so that we may provide you with the form(s) necessary for opting out of the e-file program. Please note that unless you notify us of your desire to not e-file your returns, we will prepare your returns to be e-filed.

We will provide you with a copy of the income tax returns for your review prior to electronic transmission. After you have reviewed the returns, you must provide us with a signed authorization indicating that you have reviewed the returns and that, to the best of your knowledge, you feel they are correct. We cannot transmit the returns to the taxing authorities until we have the signed authorization. Therefore, if you have not provided our firm with your signed authorization by April 11, 2025, we will place your returns on extension, even though they might already have been completed. In that event, you will be responsible for ensuring that any payment due with the extension is timely sent to the appropriate taxing authorities. You will also be responsible for any additional costs our firm incurs arising from the extension preparation.

Finally, please note that although our firm will use our best efforts to ensure that your returns are successfully transmitted to the appropriate taxing authorities, we will not be financially responsible for electronic transmission or other errors arising after your returns have been successfully submitted from our office.

By your signature below, you understand and agree that you are responsible for the accuracy and completeness of the records, documents, explanations, and other information provided to us for purposes of this engagement and you agree to provide us with such information. You have the final responsibility for the income tax returns; therefore, you should review them carefully before you sign the e-file authorization forms, or sign and submit your income tax returns directly to the appropriate taxing authorities. You agree that our firm is not responsible for a taxing authority's disallowance of deductions or inadequately supported documentation, nor for resulting taxes, penalties, and interest.

Fees

Fees for our services will be at our standard rates plus computer charges and out-of-pocket expenses. Payment for service is due when rendered and interim billings may be submitted as work progresses and expenses are incurred. If we have not received payment within ninety (90) days of our invoice, all work will be suspended until your account is brought current. You acknowledge and agree that in the event we stop work or withdraw from this engagement as a result of your failure to pay on a timely basis for services rendered as required by this engagement letter, we shall not be liable for any damages that occur as a result of our ceasing to render services.

Our professional fees for the services outlined above are based on the complexity of the work to be performed, our acquired knowledge attained from substantial research regarding new laws and regulations, and the related time to complete the work; plus other out-of-pocket costs such as report production, typing, postage, etc. Our fees will depend upon the availability, quality and completeness of your records. You agree that you will deliver all records requested by our staff on a timely basis. In the event that your records are not submitted in a timely manner, or they are incomplete or unusable, we reserve the right to charge additional fees and expenses for services to complete the work or withdraw from the engagement.

Our invoices for these services will be rendered each month as work progresses and are payable upon presentation. We are required to inform you that we charge interest at a rate of 18% per annum on all invoices more than thirty (30) days old. There will be a \$40.00 charge for all returned checks.

Any return that is mailed, will incur an additional charge of \$15.00.

We are responsible for preparing only the returns listed above. Our fee does not include responding to inquiries or examination by taxing authorities. However, we are available to represent you. Our fees for such services are at our standard rates and would be covered under a separate engagement letter.

Other Matters

In connection with this engagement, we may communicate with you or others via email transmission. We take reasonable measures to secure your confidential information. However, as emails can be intercepted and read, disclosed, or otherwise used or communicated by an unintended third party, or may not be delivered to each of the parties to whom they are directed and only to such parties, we cannot guarantee or warrant that emails from us will be properly delivered to and read only by the addressee. Therefore, we specifically disclaim and waive any liability or responsibility whatsoever for interception or unintentional disclosure or communication of email transmissions, or for the unauthorized use or failed delivery of emails transmitted by us in connection with the performance of this engagement. In that regard, you agree that we shall have no liability for any loss or damage to any person or entity resulting from the use of email, including any consequential, incidental, direct, indirect, or special damages, such as loss of sales or disclosure or communication of confidential or proprietary information.

We may, from time to time and depending on the circumstances and nature of the services we are providing, share your confidential information with third-party service providers, some of whom may be cloud-based, but we remain committed to maintaining the confidentiality and security of your information. Accordingly, we maintain internal policies, procedures and safeguards to protect the confidentiality of your personal information. In addition, we will secure confidentiality terms with all service providers to maintain the confidentiality of your information and will take reasonable precautions to determine that they have appropriate procedures in place to prevent the unauthorized release of your confidential information to others. In the event that we are unable to secure appropriate confidentiality terms with a third-party service provider, you will be asked to provide your consent prior to the sharing of your confidential information with the third-party service provider. Although we will use our best efforts to make the sharing of your information with such third parties secure from unauthorized access, no completely secure system for electronic data transfer exists. As such, you understand that the firm makes no warranty, expressed or implied, on the security of electronic data transfers.

It is our policy to keep records related to this engagement for 10 years. However, Pennoptic CPAs and Strategic Partners does not keep any original client records, so we will return those to you at the completion of the services rendered under this engagement. It is your responsibility to retain and protect your records (which includes any work product we provide to you as well as any records that we return) for possible future use, including potential examination by any government or regulatory agencies. Pennoptic CPAs and Strategic Partners does not accept responsibility for hosting client information; therefore, you have the sole responsibility for ensuring you retain all your financial and non-financial information, data and records. Upon the expiration of the 10-year period, Pennoptic CPAs and Strategic Partners shall destroy our records related to this engagement

If any dispute arises among the parties hereto, the parties agree to first try in good faith to settle the dispute by mediation administered by the American Arbitration Association under its applicable rules for resolving professional accounting and related services disputes before resorting to litigation. Costs of any mediation proceeding shall be shared equally by all parties.

Client and accountant both agree that any dispute over fees charged by the accountant to the client will be submitted for resolution by arbitration in accordance with the applicable rules for resolving professional accounting and related services disputes of the American Arbitration Association, except that under all circumstances the arbitrator must follow the laws of Pennsylvania. Such arbitration shall be binding and final. IN AGREEING TO ARBITRATION, WE BOTH ACKNOWLEDGE THAT, IN THE EVENT OF A DISPUTE OVER FEES CHARGED BY THE ACCOUNTANT, EACH OF US IS GIVING UP THE RIGHT TO HAVE THE DISPUTE DECIDED IN A COURT OF LAW BEFORE A JUDGE OR JURY AND INSTEAD WE ARE ACCEPTING THE USE OF ARBITRATION FOR RESOLUTION. The prevailing party shall be entitled to an award of reasonable attorneys' fees and costs incurred in connection with the arbitration of the dispute in an amount to be determined by the arbitrator.

If the above fairly sets forth your understanding, please sign the enclosed copy of this letter and return it to us.

We are pleased to have you as a client and look forward to a long and mutually satisfying relationship.
Sincerely,

Pennoptic CPAs and Strategic Partners

Approved:

Accepted By: _____

Date: _____

Client Portal Instructions

1. Visit our website:

<http://www.pennoptic.com>


Click on RESOURCES then Client Portal

*You can bookmark this page on your web browser for easier access in the future

2. Login Information:


Pennoptic CPAs and Strategic Partners LLC

Welcome Back

Enter your details to log in securely. 

Primary Contact's E-mail

Password

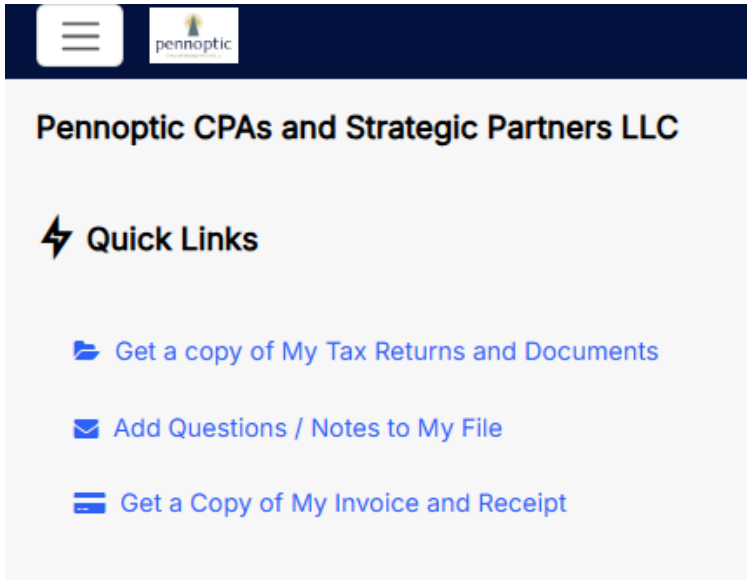
Log in 

[Need a Password or Forgot Password?](#)

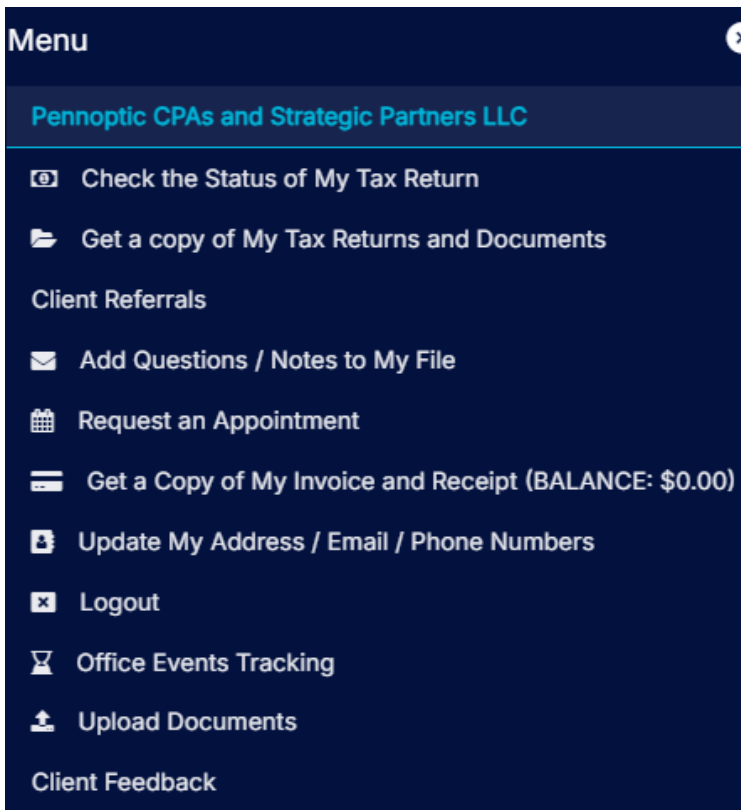
Enter E-mail and Password. If you forgot or do not have click on Need a Password or Forgot Password. This will allow you to reset your password or set up a new account.

(If you have your individual & business taxes done here, we will link the accounts, so you will be able to access your business portal by logging in to your personal portal.)

Once you have logged in you will see the following menu:



Click the menu link (the three lines in above picture) and choose from the drop-down menu below:



Any questions please feel free to to call our offices for assistance



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CPAs and Strategic Partners LLC

Michael Snyder, CPA

Pursuing an interest in business and numbers, I studied accounting and economics at Penn State University before graduating in 2016. I began my public accounting career with KPMG in Harrisburg, PA serving large business tax clients, but ultimately found a desire to work with individuals and small-businesses to help find solutions for the tax situations they faced.

I began working with Witmer Tax, now Pennoptic CPAs and Strategic Partners, in 2020. In addition to preparing and reviewing tax returns, I greatly value the opportunity to participate in tax planning conversations with our clients as well as their other trusted advisors. I serve as a liaison with our key financial services partners, often having the opportunity to bridge the gap between financial advice and tax advice to best serve our clients.

Outside of the office you may find me spending time with my wife, pets, and extended family, watching a Penn State football game, or traveling.

Dhari Glass

I joined Witmer Tax in 2020 to start my career as a tax preparer. Over the years, I have gained extensive knowledge and continue to hone my skills in tax preparation. As a QuickBooks ProAdvisor, I also do bookkeeping and payroll for a number of clients. In addition to working at Pennoptic CPAs and Strategic Partners, I help my husband grow his business doing bookkeeping and payroll. I look forward to growing both professionally and personally as part of the team at Pennoptic CPAs and Strategic Partners.

Chris Grebinger, EA

I started my accounting career with Witmer Tax back in 2005 working as part-time seasonal help. After 9 years with Witmer, I left and started working full time at various local tax firms doing a wide variety of financial duties including; preparing payroll, bookkeeping for small business clients and non-profits, notice resolution and preparing tax returns. I earned my Enrolled Agent designation 8 years ago and worked several years as the 1040 team leader, educating other tax preparers and helping tax season to run smoothly. In 2023, I came back home to Witmer Tax to specialize in individual tax preparation. I am looking forward to assisting new clients as well as our established ones as we move forward as Pennoptic CPAs and Strategic Partners LLC.

Joanne Platt, MBA

I graduated with an undergraduate degree in marketing from Towson University and a MBA from Eastern University. I have worn many hats over the years in different jobs and career paths. In 2017, I began working in the tax/accounting field for many years. In 2022, I started working for Witmer Tax now known as Pennoptic CPAs and Strategic Partners LLC as an Administrative staff member. In my position, I assist clients with intake of tax information, client questions, assist tax preparers and other staff members as needed throughout the year. I am usually the voice on the phone when calling the Willow Street office and I am eager to assist our clients. In my free time, I enjoy being with my kids, husband and friends

Tane' Sines

Since 2008, I have had the pleasure of working with Witmer Tax. I started out as an Administrative seasonal staff member and after a few years I was promoted to Office Manager. Throughout my career I have been able to manage and maintain office operations and procedures, ensuring efficiency and compliance to establish policies and office procedures. I have excellent communication skills and outstanding customer service. I have been dedicated to ensuring accuracy in reviewing and processing tax returns. I look forward to joining the team at Pennoptic CPAs and Strategic Partners LLC.

Kathy Keely, EA

I have 40 years of experience in the accounting field. I have had the pleasure of working with Witmer Tax since 2016. In 2019, I earned my Enrolled Agent status which gives me the privilege of representing taxpayers before the Internal Revenue Service. I am grateful for the loyalty of my valued clients and their continued support and look forward to working with our returning clients and new clients in the upcoming tax year.