



pennoptic

CPAs and Strategic Partners LLC

Dear Valued Client,

We hope this letter finds you well and we look forward to working with you again this tax season. Thank you for the continued trust you place in our firm — it's a privilege to serve you.

Attached is our 2025 Tax Season Engagement Packet. This outlines our respective responsibilities, the provisions and responsibilities of us to you and you to us for tax preparation. Please review these documents and sign where indicated. Please return your signed forms in person, by mail, via e-mail, or through our secure client portal as soon as possible.

This year brings some of the most significant tax law changes in recent memory with the passage of the *One Big Beautiful Bill (OBB)*. The legislation includes wide-ranging updates affecting individuals, businesses, and estates — from expanded credits and deductions to new limitations and filing requirements. As always, our team is committed to staying ahead of these developments to ensure you receive the most accurate and beneficial tax guidance.

Our secure client portal and electronic communication tools allow us to work with you effectively from anywhere. We are planning to hold a webinar to review use of the portal, and our new electronic document signing feature. The webinar is scheduled for January 13, 2026 at 10:00. Additional information will be sent closer to this date, via email.

To complete your tax returns by the April 15th deadline, we need all of your tax information by March 21, 2026. We cannot guarantee that returns will be completed by the deadline if the information is not received by this date. You will find office hours for all our locations, as well as more relevant information, on our website: www.pennoptic.com.

We sincerely appreciate your trust and confidence in Pennoptic.

Warm regards,

Jeff Bleacher, Managing Partner
Pennoptic CPA's & Strategic Partners