



KJ Tax & Accounting, LLC

Certified Public Accountants
Jim Filicetti, CPA, CITP
501 E. Main Street
Waterford, Wisconsin 53185

Phone 262-514-3800
E-mail kjtax@kjtaxacct.com

January 15th, 2018

Dear Family, Friends and
Clients:

Happy New Year to you, your family and your business. In the coming days you will be receiving our popular client checklist to assist you in gathering your 2017 supporting documentation. Once your checklist is complete, please forward the information and checklist for preparation of your return via our portal that can be found at our website www.kjtaxcpa.com. Otherwise, please mail or place your supporting documentation in our secure mailboxes or drop off during our normal business hours Monday through Friday 9AM to 4:30PM. All completed tax returns will be delivered electronically this year. An additional \$20 fee will be assessed for requested paper returns that MUST be mailed. Pickup of returns will be available this year, however you must call in advance to have a copy available for you 262-514-3800 x101.

For many of you, thank you for signing our engagement letter and paying in advance for your return. With the Affordable Care Act, other tax law changes and increased investments in education and training, we are unfortunately seeing significant increases in the investment to continue preparing and reviewing your tax returns. We are doing our best to keep our fees low by utilizing advanced technologies, subcontracting services and continuing education. In exchange, you can always expect paying the least legal amount of tax possible, superior service and being available to you and your ever tax changing needs.

Due to privacy considerations we are including SecureDrawer, our secure documentation portal. All tax return and supporting documentation will be securely available at <https://app.securedrawer.com>. All clients will be asked to participate in our required Protection Plus Audit Insurance for \$48 per year. This will ease your mind to know that we will cover any notice from the IRS or State Revenue Department you receive. All clients will be asked to participate in our subcontracting services. Disclosure forms and consent are included. All of these items are very important considerations when it comes to servicing your account. We appreciate your cooperation.

Did you know www.kjtaxcpa.com provides all of the highlights of our highly talented team members, tax law changes, useful calculators and helpful hints to keep your taxes in check. Please utilize the website as much as you wish. This is another great way to get help 24/7. We want you to reach your financial goals.

Our mission is to be certain you are paying the least legal amount of tax possible, that our team provides value to you, your family and your business and that you are successful by your investment in us. Now is the time to take advantage of your local CPA and all they have to offer. We have the right experience to help you and your situation. Why wait, reach out today. We look forward to working with you. Happy New Year from KJ Tax & Accounting, LLC. Thank you, we truly value your continued business.

Sincerely,

James N. Filicetti, CPA

James N. Filicetti, CPA

KJ Tax & Accounting, LLC

Sound Advice/Reasonable Price

Members AICPA & WICPA

Waterford 262-514-3800

Mukwonago 262-363-2930

KJ Tax & Accounting, LLC
Rate Schedule for 2017

Published Fees Effective January 1, 2018
Fees may vary by case to case basis

Individual Tax Preparation Fees -anticipated average 10% increase. EXAMPLE: If your last year's charges \$300 now would be 500 Similar situation needs to apply to qualify. Prices are subject to change due to circumstances changing. Per forms method of billing will be used to determine circumstantial change. In addition, protection "Insurance" package for \$48 per total Invoice will be added to protect you from audit. Our popular portal "SecureDrawer" will be included in your fee at \$12 per year.

Platinum Monthly Subscription Service- Our clients best option. The corporate, partnership and or individual return, CPA consultations, CPA tax planning, bookkeeping, QuickBooks Hosting, Insurance, SecureDrawer and pricing for 2017 all for one low monthly inclusive fee. Call 262-514-3800 x102 or e-mail kjtax@kjtacacct.com ask for Jim Waterford- Proposed Monthly Subscription Proposal will be sent. Additional fees may apply if out of the scope of the services.

Other Pricing Plans-

CPA Services (Corporate, Individual, Estate and Trust Consulting) **\$300.00 per Hour**

Certified Accountant Services (CPA Bookkeeping Consultation) **\$180.00 per Hour**

Certified Bookkeeping Services **\$120.00per Hour**

Include data entry of checks, deposits, credit card charges and bank reconciliation for startup or catch up purposes only. Rate will be given before services start. A retainer may be requested before work begins.

Information Technology Services **\$180.00 per Hour**
Calls & questions exceeding 10 minutes will be charged accordingly. Trip time will be billed at \$60 per hour plus \$0.55 per mile. Quotes, contracts and warranties that are signed will be honored in lieu of above.

SecureDrawer (Not Included in Preparation Fee) **\$12 per Year**

A fast, easy and secure electronic means to securely access your tax returns & supporting documentation. Visit www.kjtaxcpa.com for more information.

Required Insurance Protection- **\$48 Per Return**

Take the worry out of pesky notices from the IRS. We will represent you in front of the IRS and State Taxing Authorities for up to 4 hours of CPA services to properly resolve your issue. Relax and let us take care of it for you.

QuickBooks Hosting, Assisted Payroll & Merchant Services **Call for Pricing**

KJ Tax is a national leader when it comes to adding efficiency and value to you, your family and your business. We will be identifying opportunities for you along the way to suggest our efficient solutions for you. Packages start as low as \$59.95 per month. Special Promotions will be made available throughout the year. Visit www.kjtaxcpa.com for more details.

KJ Tax & Accounting Interactive Website **Free**

Enjoy the benefit of our up to date, interactive and educational website. From our live e-newsletter alerts to interactive Financial Planning tools, feel free to visit often and explore the power of the site.

Telephone & E-mail Consultation Rates

Telephone and E-mail rates same as Consultation rates above. Team member will make every attempt to inform the client that the telephone or e-mail consultation will be a chargeable event or not.

Terms: Individual, Partnership and Corporate tax returns need to be **paid in full by VISA, MasterCard, Discover, AMEX, check or cash** BEFORE the return is electronically filed. Corporate clients, all invoices due on receipt. Administrative fee of \$5 per month and 1.5% interest will be charged on ALL overdue invoices. All invoices over 90 days old will be automatically sent to collections, no exceptions.

Thank you for your continued business. We value your relationship with us!

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Jim Filicetti, CPA, CITP
501 East Main Street
Waterford, WI 53185



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E-mail kjtax@kjtaxacct.com

January 15th, 2018

Dear Family, Friends and Clients:

In order to provide you with the best service and value possible, we use a number of business partners outside of the firm. We often have to disclose certain tax return information and this letter is to request your consent to disclose the tax return information you provide us to all third party requests for data entry services including, but not limited to QuickBooks, Proseries, Microsoft Office, SecureDrawer, XCM Technologies, Skyline and any other Company that we must use in order for us to process your tax and accounting information.

For your convenience we request that this consent be valid until December 31, 2028. Please consent to be valid for a different period please indicate so in the space provided.

The IRS requires that the language in the attached consent form may not be altered in any way. Nevertheless, much of their text does not apply to the consent sought by KJ Tax & Accounting LLC. Specifically, signing this consent form will not result in the disclosure of your personal information to anyone for any reason other than the preparation and filing of your return.

Furthermore, your tax return information is protected from further use or distribution by a legally enforceable non-disclosure agreement between us and the above mentioned companies. Finally, we will provide you service regardless of whether you sign this consent form.

Our objective has always been to provide you with superior service and if you do have any questions or concerns regarding this form, please feel free to call me at 262-514-3800.

Thank you for your thoughtful consideration and understanding.

Sincerely,

James N. Filicetti, CPA

James N. Filicetti, CPA

KJ Tax & Accounting, LLC

Sound Advice/Reasonable Price

Members A/CPA & WICPA

Waterford 262-514-3800

CONSENT TO DISCLOSURE OF TAX RETURN INFORMATION

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot disclose, without your consent, your tax return information to third parties for purposes other than the preparation and filing of your tax return and, in certain limited circumstances, for purposes involving tax return preparation. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution.

You are not required to complete this form. Because our ability to disclose your tax return information to another tax return preparer affects the service that we provide to you and its cost, we may decline to provide you with service or change the terms of service that we provide to you if you do not sign this form. If you agree to the disclosure of your tax return information, your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year.

This consent to disclose may result in your tax return information being disclosed to a tax return preparer located outside the United States, *including your personally identifiable information such as your Social Security Number ("SSN"?)*. Both the tax return preparer in the United States that will disclose your SSN and the tax return preparer located outside the United States which will receive your SSN maintain an adequate data protection safeguard (as required by the regulations under 26 U.S.C. Section 7216) to protect privacy and prevent unauthorized access of tax return information. If you consent to the disclosure of your tax return information, Federal agencies may not be able to enforce U.S. laws that protect the privacy of your tax return information against a tax return preparer located outside of the U.S. to which the information is disclosed.

If you agree to allow KJ Tax & Accounting LLC to disclose your tax return information, including your SSN, to Xpitax LLC for purposes of providing assistance in the preparation of your 2017 individual income tax return, please check the box below, provide the information requested below, and sign and date your consent to the disclosure of your tax return information.

I, _____, authorize KJ Tax & Accounting LLC/CFO Accounting Services LLC to disclose to Xpitax LLC my tax return information including my SSN to allow Xpitax LLC to assist in the preparation of my 2017 individual Income tax return.

Signature: _____

Date: _____

Consent Valid Through December 31, 2028

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email at comp/aints@tigta.treas.gov.