



ROESNER | KENNEY

TAX & ACCOUNTING

Marianne Roesner, EA
19531 Marigold Street NW
Oak Grove, MN 55303
(763) 753-5555

Christina Kenney, EA
10818 River Road NE
Hanover, MN 55341
(763) 210-9956

Fax (763) 753-6666
roesnertax@roesnertax.com

January 4, 2018

Dear Clients,

Happy New Year!! You've made it through another year and thus begins the task of collecting your tax data for the new filing season.

We've seen many changes again this year. Most notably are the changes in MN Tax law and the upcoming changes due to the Tax Cut and Jobs Act.

It is very important that you carefully read this letter. All of the forms listed below must be completed, signed and brought to your tax appointment. If you have any questions on any of the material you find here, be sure to contact our office.



SCHEDULE YOUR APPOINTMENT ONLINE!

We continue to offer you the opportunity to book your tax appointment online. This feature allows you to quickly book your appointment for a date and time that is convenient for you. Please visit us at www.roesnertax.com and click on the **Book Now** icon (*on the right sidebar of our website*) to begin the process.

You will find the following letters and forms on our website at www.roesnertax.com/client-tax-packet/:

1. Year-End-Client Newsletter
 - a. Contains important information regarding 2017 MN tax changes and the new Tax Cuts and Jobs Act.

2. 2017 Engagement Letter
 - a. Read the letter completely – then sign and date page 4 (both spouses must sign)
 - b. **The entire letter must be returned to us**
 - c. Be sure to keep a copy for your records



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3. 2017 Checklist

- a. **The checklist must be completely filled out and returned to us**
- b. Both spouses must sign and date the checklist
- c. If you received a personalized organizer, the checklist is included in it

4. 2017 Tax Organizer – Additional Questions

- a. **The additional questions sheet must be completely filled out and returned to us**
- b. Both spouses must sign and date the checklist
- c. If you received a personalized organizer, the checklist is included in it

5. 2017 Tax Organizer (Blank) or (Personalized -found in your secure portal)

- a. Provided to assist you in gathering your tax documents
- b. **This form is optional**

6. Required Documents

- a. Driver's license or other Government issued ID for all persons listed on your return *(If we don't already have on file)*
- b. Social Security cards for all persons listed on your return *(If we don't already have on file)*
- c. Insurance cards for all persons listed on your return

The IRS requires us to obtain a copy of your social security card and government ID *(such as a driver's license)* for all of our clients and their dependents, even if you have been a client for many years. **This requirement is to help protect your identity and prevent fraud.**

Thank you for your time and patience. We look forward to seeing you soon!

Sincerely,

Christina Kenney, E.A.