High Falls ADVISORS
Your Trusted Financial Guides

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Dear Tax Client:

We hope that this letter finds you and your family well. Our tax team is currently preparing for the 2016 tax filing season and we will begin taking appointments and preparing taxes on **Wednesday, February 1, 2017.** Our regular office hours are Monday through Friday 8:30 to 4:30, but we are able to accommodate evenings and Saturdays upon request. You may drop off your tax documents, mail them to our office, or schedule an appointment. If you would like to have your tax return completed while you wait, you must schedule an appointment. If you intend to drop off or pick up your tax documents after our regular office hours, **please make sure we will be in the office**. The best number to reach us after hours is (585) 935-5308.

Enclosed you will find an *Engagement Letter*, *Consent to Use Tax Return Information Form*, *Client Intake Data Sheet*, *Hours and Directions*, and our *2016 Tax Year Checklist*. **Please complete and include all yellow sheets when you come for your appointment or drop off your tax documents.** The *Consent to Use Form* is optional, but signing it will allow us to mail you newsletters and provide you information about upcoming seminars and other news about High Falls Advisors.

Please note that NYS now requires information from your Driver license or Non-Driver ID. Collection of this data is being used as an additional verification device to deter fraud. We are asking that you provide a copy (front and back) of your Driver License or Non-Driver ID with your tax packet or you can ask our receptionist to make a copy when you drop off your documents.

The tax filing deadline this year is **Tuesday**, **April 18, 2017**. In order to meet this deadline, our office must receive all tax documents or have your appointment on the schedule no later than **Saturday, April 1, 2017**. If received after this date, we may have to file your taxes on extension.

As you gather your documentation this year, remember that many of your tax forms are available online and may no longer be mailed out in paper format. We will do our best to remind you of forms that may be missing if we had them in a prior year. The most common omissions we have seen are: NYS unemployment forms (1099-G), student loan interest forms (1098-E), investment income forms, particularly if you don't receive paper statements and college tuition statements (1098-T).

Please visit our website at www.highfallsadvisors.com to access additional tax resources and worksheets to help you as you prepare your tax data. From the homepage, select the "Tax Tools" tab under "Client Resources." Also, if you would like a personalized tax organizer e-mailed or mailed to you, please e-mail us at tax@highfallsadvisors.com or call Bob Vay at 585-935-5300, ext. 107.

Thank you so much for your continued business and referrals. We look forward to working with you this year.

Sincerely,

High Falls Advisors, Inc. Tax Team