



LEWIS ACCOUNTING  
& TAX SERVICE, INC.

649 Cedar Road, Suite 200, Chesapeake Virginia 23322

Dear Valued Client,

We hope that 2024 was an amazing year for everyone and we are looking forward to seeing you soon. Our team would like to take this opportunity to “**Thank You!**” for your trust in us and let you know that we look forward to seeing you within the upcoming months.

To set up your preferred tax appointment, please call the office at [757-819-7218](tel:757-819-7218) or go to our website and click "make an appointment"(\*). If you have any questions or would like our office to send you a [2024 Tax Organizer](#), please do not hesitate to contact us.

Attached is our 2024 checklist to assist you in gathering your income tax documents. This list is an excellent reference and allows us to make certain all your applicable deductions are captured on your tax return. You may have additional documents that are not included or some items may not apply to you.

If you plan to email your documents to us, we will be using Sharefile again this year as our secure portal. If you don't have a link set-up yet to the portal, give us a call or email us to send you a link. If you set one up last year, the password is still good. ***Due to security issues, we are not responsible for personal information that is sent to us via any electronic means. Please take every security precaution. Please do not send account numbers or social security numbers unsecure. Please send or upload all your documents at one time and make certain to include a cover sheet or an email listing the items included.***

Once your tax return is complete, if you would like to electronically sign, we will send your invoice ahead of your return and this will need to be paid **before** we can release the prepared return. Then we will schedule a time to speak with you to review your tax return and take the opportunity to make certain nothing is missing before you sign the return and answer any questions you may have.

Any returns sent to the portal or dropped off after March 15<sup>th</sup> are not guaranteed for completion by April 15<sup>th</sup>. We will do our best to meet the deadline, but an extension may need to be filed. Accuracy is more important than timely filed. It is an extension to file, not to pay. Any balance due will be your responsibility to have in by April 15<sup>th</sup>.

Thank you for your understanding and excellent partnership. We will speak with you soon!

*Lewis Accounting & Tax Service, Inc. Team*

Telephone: (757) 819-7218 Email: [contactus@lewisaccountingandtaxservice.com](mailto:contactus@lewisaccountingandtaxservice.com)

Website: [www.lewisaccountingandtaxservice.com](http://www.lewisaccountingandtaxservice.com)