

**Rom Gilbert, CPA**  
**PO Box 1990**  
**Keystone Heights FL 32656**  
**352-473-3332**  
**January 2, 2025**

«First\_Name» «LastName»  
«Address\_1»  
«Address2»  
«City», «State» «Postal\_Code»

Dear «First\_Name»,

“Those that would disrespect our flag, have never been handed a folded one!” Author unknown.

My mailing address and phone number are listed above. My email address is [romcpa@romgilbert.us](mailto:romcpa@romgilbert.us). I expect to receive your tax info before the end of March.

- [1] **CLIENT CHECKLIST:** Enclosed. Cross out any tax information that should be deleted. Provide all required tax documents for prompt completion of your tax return.
- [2] **FORM 1040 TAX INFORMATION (2024):** Enclosed. Check it out. Additional related information is available.
- [3] **INFORMATION CHANGES:** Provide updates such as mailing address, telephone number, dependents (child tax credits), email address, etc.
- [4] **BANKS and CREDIT UNIONS:** For direct deposit changes, provide the routing number and the account number as shown on your checks.
- [5] **PHONE CALLS:** Keep phone messages short but speak your phone number slowly. State your name and phone number twice. I may not answer the phone if I don't recognize the number or name.
- [6] **IRS LETTER:** If you receive a NOTICE from the IRS, get a copy to me as soon as possible. It is difficult to win a case if we don't respond.
- [7] **EARLY FILING:** Filing your return early is one way to protect against identity theft. If you receive a PIN from the IRS, please provide it to me. When provided, this 6-digit number is required to e-file your tax return.
- [8] **TAX INFO DEADLINE:** My deadline for receiving tax info is March 31, 2025 with exceptions such as K-1s not received.
- [9] **CHILD BIRTH INFO (2024):** Please report early if you had a child in 2024. Yes, believe it or not, this occurred twice last tax season. Provide the name listed on social security card, social security number, date of birth and relationship.

Please check website [romgilbert.us](http://romgilbert.us) for relevant information (e.g. tax changes) and for updates.

Sincerely,

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