



# Madrona Bookkeeping & TAX SERVICES, INC.

Madrona Bookkeeping & Tax Services, Inc  
3214 50<sup>th</sup> St Ct NW Ste 304  
Gig Harbor, WA 98335

Dear Tax Client,

Hello and welcome to 2023 tax filing. If you need an organizer to help gather your information, please let us know. We can send this to you electronically or via USPS mail. We have continued our efforts to reduce our paper usage and waste. Please upload your tax documents, this letter, and an updated copy of your driver's license to our secure portal. The portal and our online scheduler are available on our website, [www.madronabookkeeping.com](http://www.madronabookkeeping.com). Please call (253) 858-2633 or text (253) 861-8059, if you need assistance.

Please note that if you are dropping off or have a scheduled meeting, we have moved. Address is at the top of the letter!

The IRS does not allow tax preparation fees to be deducted from your federal tax refund. We cannot release any tax returns without payment in full, so please be prepared to settle any outstanding balances prior to picking up or electronically receiving your return documents. For your convenience we do offer several payment options and are willing to work with you. Any information received within fourteen (14) days of filing due date will have an additional 25% Rush fee added to the invoice and 50% rush within seven (7) days, this does not apply to those who file extensions.

Your original records will be returned to you at the end of this engagement. You should securely store these records, along with all supporting documents, cancelled checks, etc. As these items may later be needed to prove accuracy and completeness of a return. Copies of your return, supporting documents, and notes will be retained by Madrona Bookkeeping & Tax Services, Inc for ten (10) years, after which these documents will be destroyed.

This year we will also be supporting local charities in the community. Donating to one of these charities will earn you a **\$15 discount** on your tax preparation services. Please inquire as to our **SENIOR DISCOUNT** as well.

**To affirm that this letter correctly summarizes your understanding of the arrangement and to initiate services for this work, please sign at the bottom and return with your tax documents.**

Thank you again for allowing our office to prepare your return this year! We appreciate your business!

Jennifer Price-Paul  
Madrona Bookkeeping & Tax Services, Inc

Print:

Taxpayer Name: \_\_\_\_\_

Taxpayer Spouse: \_\_\_\_\_

Signature: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Date: \_\_\_\_\_