



**LEWIS ACCOUNTING  
& TAX SERVICE, INC.**

649 Cedar Road, Suite 200, Chesapeake Virginia 23322

Dear Valued Client,

We hope your family enjoyed the Holiday Season! 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. Our relocation in 2022 allowed us the opportunity to expand our team so you may see or speak with some new smiling faces!

To set up your preferred tax appointment, please call the office at 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 **2023 Tax Organizer**, please do not hesitate to contact us.

Attached is our 2023 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 prefer to send in your tax documents electronically, upon request, we can email you a secure link or you can fax us your tax documents to the number referenced below. 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.

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

*Lewis Accounting & Tax Service, Inc. Team*

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