



Accounting & Financial Statements  
Tax Planning & Preparation  
Retirement Planning  
Business Consulting  
Payroll Services

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May 15, 2023

To All our Valued Clients

As many of you are aware, we have been searching for additional staff for over two years. We continue to be understaffed in our bookkeeping employees and our efforts to find potential manager/income tax preparers has proven to be a challenge we can't solve. Discussion with others in our industry suggest that we are not the only firm experiencing this void and the probability of changes to this trend are not encouraging. It appears many in our industry have decided they want to work remotely and we are unwilling to accommodate them. Most everything we do requires discretion and protection of sensitive information and we are unwilling to outsource this information to overseas firms or a USA resident we have only met through a brief Zoom call. Customer Service is the foundation of our business and we can't provide that service without in-house trained personnel.

**WE HAVE DECIDED TO CLOSE OUR OFFICE PERMANENTLY  
EFFECTIVE MAY 31, 2023**

This has been a difficult decision but we believe it is the correct decision.


This decision leaves a lot to be considered by all of us over the next few months. Listed below are our commitments to make the transition as seamless as possible:

- We will provide sales tax filings and Financial Reports for the month of May 2023 which means we will continue to provide bookkeeping services through June 30, 2023.
- We will prepare previously extended 2022 income tax returns through October 15, 2023. We will prepare fiscal year tax returns, not including extensions, through December 31, 2023. We will not provide income tax preparation services for tax years beginning or ending after December 31, 2023.
- We will continue our practice of shredding all retained paper work for tax years that are older than seven calendar years. If you want to pick up your hard copy paper, please advise so we can arrange a pick-up date. If you want electronic copies of prior tax returns or financial statements, please advise so we can plan accordingly.
- We are having discussions with other firms about their interest in providing bookkeeping or income tax preparation services but nothing is firm at this point. We will advise when a satisfactory arrangement is achieved.
- Our office will be closed the week of June 19, 2023 through June 23, 2023 for previously planned family vacations.

We appreciate your loyal support over the last 33 years and wish everyone well in the coming years.

Sincerely,

  
Donald W. Brown

  
Meredith B. Goodin

*Professional Services for Businesses and Individuals*