

Joseph Ferrara
100 Horizon Center Blvd., Office #122
Hamilton, NJ 08691

January 6, 2025

I would like to wish you and your family a Happy and Healthy New Year! With the end of another year comes the start of a new tax season.

Similar to last year, you have the ability to submit your tax documents:

- 1) **Electronically:** Upload to my portal
 - a. Existing users: <https://ferraratax.securefilepro.com/portal/#/login>
 - b. New users: Please contact me at joseph@ferraratax.com to create an account
- 2) **Mail:** Attn: Joseph Ferrara Office #122, 100 Horizon Center Blvd., Hamilton, NJ 08691
- 3) **Drop off:** 100 Horizon Center Blvd., Office #122, Hamilton, NJ 08691

Additionally, if you would like to meet during tax season (though not required), please book an appointment via my website (www.ferraratax.com). Please see the appointment instructions sheet included with this package.

Enclosed are documents necessary for the preparation of your 2024 Income Tax Returns. These documents include:

- **(1) Engagement Letter** – Required to outline the scope of services I will provide. *Please sign, date, and return to me with your submitted documents (one signed letter by both parties if married)*
- **(2) Tax Questionnaire** – There are new tax changes every year and 2024 is no exception. I have attached a worksheet to capture information needed to prepare your returns. *Please fill out the worksheet and return to me with your tax documents.*
- **(3) Appointment Booking Instructions** – If you would like to schedule a call or meeting, please reference the instructions sheet to book an appointment via my website (www.ferraratax.com). *Please note, this is not required but rather a client option.*

The best compliment is a referral. Thank you for all your recommendations.

I look forward to working with you in the upcoming months!

Sincerely,



Joseph Ferrara, CPA

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