

Newsletter 2016

November 11, 2016



OUR 30TH YEAR!

Happy Veteran's Day from Protax Associates!

We are very excited to be celebrating our 30th year in Covina. We are proud to serve our community, and want to give back even more.

We would like to remind you once again that existing clients can drop off or mail in your paperwork. This will help to avoid you having to book an appointment that is a few weeks out.



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This year we would like to recognize our Military Veterans!

Any of our clients who are Veterans will receive free tax preparation this year! What's the catch? Vets must book a **Sunday** with Steve only for this service.

And all clients can tell any friends that are Vets to contact us for a free return. Our online appointment system has a "Veteran's Sunday" option for all of you. If you are a Vet, or know one, please don't hesitate. These slots will fill up quickly. Our administrative staff is not in the office until after Christmas, so a phone call won't work!

We want to emphasize to new Veteran clients that there really is no catch, no fees, no nothing. We simply want to honor our Vets, and honor Steve's father (Leah's grandfather), who was a WWII hero.

Active Duty Military Personnel Receive Free Tax Preparation

We are most proud to say that this is our THIRTEENTH year in a row that we are providing this service. Click on the Military banner on our website for more information.

Please note that the parents of Active

Duty personnel also receive a free return.

You must see us before April 1, 2017 to receive free preparation. The last two weeks of the season are very, very busy and we cannot extend this service to you during that time.

Our Referral Program, Go Green Initiative, and other services

If you refer a new client (not a free Vet), you will receive a 15% discount off of your tax preparation fee.

Please help us to continue to Go Green. Bring us your flash drive so that we can load your finished tax return there and save some trees. Or we can securely email your returns.

Don't forget that we have Luis here, for your Spanish speaking friends, and Jeffrey, our Certified Financial Planner, for any questions you may have related to retirement planning, investing, Social Security, etc.

Are you sensing that we are going to be busy? Please book any of the four of us early, if you haven't done so already.

If you would like to receive your personal Tax Checklist that includes last year's information, please request it via email to info@protaxassociates.com or call us at 626-858-2340.



Our newest partner!



Joe and Leah welcomed their second baby girl, Ava Grace Moreno in July of this year! They will be extra busy with Sarah and Ava this tax season, so please book early if you'd like to see them.

Of course you can book an appointment with any of us if you so desire. Again, we think it's going to be a busy year, so we are allowing existing clients to mail in or drop off their documentation. We'll complete your return without delay as long as you are available by either phone or email to answer any questions we may have.



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Click on the Book Now button on our website to check the availability for Steve, Leah, Joe, and Luis and to book your appointment. Many happy returns!

info@protaxassociates.com

"Established in 1987, Protax Associates has been providing knowledgeable, affordable tax preparation service in California for many years. We can provide one-day service in most cases with Federal and State electronic filing included.

www.protaxassociates.com

At Protax Associates we are committed to our new as well as our existing clients. We strive to provide the very best possible service in all aspects of income tax preparation."

**Protax Associates, giving
back to our community since
1987**

