



# New Year, Your Year!

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## Happy New Year

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From us here at Southern Tax, we would like to wish you a Happy New Year. We hope that last year was a prosperous one for you. We hope even more that this year will be more prosperous than the last. We appreciate you for choosing us to service your financial needs. We take pride in providing our clients with sound financial advice that breeds financial cognizance and facilitates financial freedom. Our goal this year is that we help you achieve the financial goals you have set for this year and the years to come. Whatever your financial need is, we are here to help you exceed it. It is always a pleasure to serve you!

## The Year in Retrospect

Not only are we committed to empowering individuals and small businesses to become financially cognizant, but we are also committed to the communities in which you live and the communities in which we serve. In light of the Flint, Michigan water crisis, we partnered with Metropolitan Baptist Tabernacle, a local church in Flint, Michigan, to provide funds to purchase bottled water and water filters for members of the communities affected by this crisis. Rev. Miller, the pastor of Metropolitan Baptist Tabernacle, partnered with The Concerned Pastors for Social Action, a 501(C)3 organization, that collected water and water filters and accepted donations to purchase these items and distribute to affected citizens.

During the 2015 income tax season, Southern Tax provided up to 10% of our tax preparation fees in discounts to our clients. Through these discounts, we were able to provide funds of approximately \$200 to the Metropolitan Baptist Tabernacle to help purchase bottled water and water filters for the affected communities. We could not have done this without your confidence in our services and your belief in our mission. We appreciate your willingness to answer the call to action and help care for those around us.

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*“Spreading Southern  
Hospitality Around the  
Globe”*

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## 2016 Income Tax Season

Are you ready? The 2016 Income Tax Season commences on January 23, 2017. It's time to start gathering your W-2s, medical expenses, dependent care expenses, business deductions, and etc. in preparation for filing your 2016 income tax return. We are committed to minimizing your tax liability in the most legal and ethical way possible. We know that income tax time may be strenuous for you; therefore, we have developed new procedures to get you through this process with ease.

We have acquired a new system entitled SmartVault that allows our firm to seamlessly share and receive documents with you. The database offers many benefits for both our firm and our clients. Through SmartVault, we are able to:

1. provide clients with a safe, secure, and real-time method to transmit sensitive information,
2. provide clients with year-round access to tax information, and
3. control the users who have access to a client information.

With our new procedure, you can be assured that your information is safe 24/7, 365 days of the year.

To receive access to your client files, simply contact the firm, and access rights will be granted to you upon identity verification. Should the need arise, you can also designate authorized users access rights to your information. We are confident that this new procedure will put your mind at ease while simultaneously allowing us to consistently organize and protect your information. Your protection is priority to us.

## We Want To Hear From You!

Customer satisfaction is important to us! Upon receiving services from us, stop by our newly updated website, visit the Testimonials webpage, and leave us feedback on your experience with us. We look forward to serving you and hope to hear from you soon!



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