



To Our Wallace Consulting Community:

We hope this message finds you well! We are thrilled to share some exciting updates as we settle into our new office at **5521 Lincoln Hwy, Suite 205, Crown Point, IN 46307**. Conveniently located in *The Pointe* at the corner of Burr St. and Rt. 30, our new space reflects our commitment to serving you better.

We are excited to introduce several enhancements to our services to make your experience even better. Clients now have access to a free tax software portal, which will simplify the process of submitting and managing tax documents. Additionally, complimentary tax organizers will be available through the software portal to help you prepare efficiently for tax season.

Looking ahead to 2025, we will be offering educational seminars designed to empower you with valuable knowledge about financial matters. These seminars aim to provide you with insights that can benefit your financial future. Some topics will include *Planning for Retirement*, *Planning to Invest*, *Trust/ Estate Preparation*, *Expanding Employee Benefits*, and many more.

Furthermore, we are expanding our tax planning services to include quarterly and semi-annual options, giving you more flexibility to meet your financial goals. Our team has also been working hard to implement new technologies that will streamline and improve our services, ensuring a seamless experience for you.

As part of our commitment to providing high-quality services, we want to inform you about some updates to our policies. Charges will now apply for postage, copy/fax services for personal matters, and printing of additional documentation beyond the initial copy of the current year's tax return. Unpaid invoices will accrue interest after 30 days at a rate of 1.5% per month. This policy applies to all payroll, accounting, tax, compliance, and consulting services. To ensure a smooth tax-filing process, payment must be received before tax returns are electronically filed or client documents are released. Additionally, we kindly request that you pick up your completed tax documents within 60 days to avoid incurring a storage fee. Please note that, due to the ongoing economic changes, we have had to increase our prices; please contact our administrative team if you have questions regarding these changes.

Our goal with these updates is to continue enhancing our efficiency while delivering professional and timely services tailored to your needs. We greatly appreciate your understanding and cooperation as we implement these changes.

If you have any questions or need assistance, please don't hesitate to reach out or check on our website and social media for updates. Thank you for your continued trust and support—we look forward to welcoming you to our new office and helping you achieve your financial goals!

Warm regards,

Your trusted Wallace Consulting Team