

Thank you for choosing Nelson & Company, P.C. to fulfill your accounting and financial planning needs. We hope this letter will answer many of your questions prior to our first meeting.

**History of Nelson and Company, P.C.**

Paul Nelson started his C.P.A. firm in 1991 based exclusively on referrals and now serves over 1,600 clients nationwide. We specialize in helping small business owners as well as individuals and believe that a personal connection is paramount in providing quality accounting and financial services.

**Office Information**

Phone Number: (719) 444-0222

Fax Number: (719) 444-8970

Hours: 8:00am – 5:00pm Monday through Friday (January through April)

8:00am – 5:00pm Monday through Thursday (May through December)

E-mail: [paul@nelsonandcompanycpa.com](mailto:paul@nelsonandcompanycpa.com)

We would like to encourage you to use the above e-mail address whenever possible. Due to high telephone volume, you may receive an answer to your question sooner via e-mail. Please be as detailed as possible in your e-mail correspondence. We ask that you do not use this email address for correspondence unrelated to accounting.

**Directions:** Our office is located on a one-way street between Highway 24 (Cimarron) and Colorado Avenue. At the Hwy24-8<sup>th</sup> Street stoplight, turn north. Our office is a gray single-level building on the left side of the street just past Cucharras Street.

**New Client Forms Enclosed -**

- **New Client Data Sheet:** Complete both personal and business sections, if applicable..
- **Policies:** Please read and sign where indicated for personal and/or business clients.
- **Minimum Fee List:** A copy of our Minimum Fee List can be requested if interested. **We do not charge a fee for the initial consultation with New Clients, excluding Consultation Only clients.**
- Once you have read and completed our New Client Forms, feel free to contact our office for a new client appointment. **Paul's schedule is normally booked for 2-3 weeks, so please call as soon as possible.**
- **Please bring these forms as well as your last year's personal and/or business tax returns to your appointment.**

We hope this letter has helped to answer some of the questions that you may have. We look forward to meeting you and would like to take this opportunity to thank you for choosing our firm.

*Nelson and Company, P.C.*