



PAUL G. DION
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Millbury, MA 01527



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I am writing to inform you of an exciting change within my business. I have recently sold my business to another trusted professional who will be taking over the responsibility of providing you with exceptional service.

I sincerely appreciate your trust in me and will forever be thankful for your loyalty and patronage over the years. It is with mixed emotions that the time has come for me to focus on the next chapter of my life.

After an exhaustive search, I am excited to let you know that I have decided to transfer the operation to Nicholas Hammond of Palmer Hammond Tax Services located in Auburn. Nick and his staff embody the same dedication, values, and ethics that I have built my practice around.

In my search, it was important to find a firm that could provide the knowledge and tax advisory services along with the usual top level tax preparation and responsiveness, you have become used to with us. I believe Palmer Hammond can deliver all of that and more.

Benefits of using Palmer Hammond Tax Services:

- Palmer Hammond will continue to operate out of our Millbury Location
- Palmer Hammond will retain the majority of Paul Dion CPA staff, so they will continue to work for you.
- You will be able to upload your documents or drop them off at our Millbury Location and now Auburn as well.
- I will remain involved in the operation on a consultative basis to Nick and Palmer Hammond throughout the year to assist in a smooth transition.
- Palmer Hammond's pricing is comparable to our own and is very reasonable.

To ensure a smooth transition and make sure Nick's office has all they need to prepare for this year's tax season, I have enclosed a **release form** so that I can provide Palmer Hammond Tax Services with your prior year's tax records. Without this, I will be unable to share any of your personal financial information. **Please sign, date, and return at your earliest convenience.**

You can fax it (508.306.9692), send it by mail (addressed envelope enclosed), deposit it in our drop-box, e-mail it to paul@pauldioncpa.com, or electronically opt-in.

We will be reaching out to you to answer any questions, schedule a meet and greet with Nick and his staff, and personally assist you in whatever you need in this transition. If you'd like to proactively set up a meeting with the folks at Palmer Hammond, please call them at 508-832-0114. Please feel free to also call me with any questions. Also enclosed is a FAQ (Frequently Asked Questions) form that will answer many of your questions.

We will be holding a Zoom Town Hall on November 13 at 1pm. I will send you the invitation via email.

Thank you for the many years you have trusted Paul Dion CPA PC/Smart Tax Advisor to prepare your tax returns. It has been a pleasure getting to know you, and I wish you continued success in the future.

Best Wishes,

Paul Dion CPA PC