Tips on how to have a smooth tax season experience and save on your fees!

1. **Watch for our communication.** If we are missing information we will call or email, please check your phone and your email so that you can respond timely. Let us know if you will be away so we can plan accordingly. We give 48 hours for your response before we move your return to the back of the line. We also send out helpful hints and mass communication through our Facebook page, please Like us at www.facebook.com/M-Greenwald-Associates-LLP. We also provide access to all of our forms on our website under "Tax Season Forms".

2. **Delivery of documents.** Organizing all your documents and delivering them at one time in a complete and organized package will help us be efficient.

   a. Late Arriving investment statements and K-1's can be submitted when you receive them if you anticipate they will arrive after March 15th.
   b. Please provide all additional information requested in one set within 48 hours of our request. Incomplete responses will require additional communication which will be billed.
   c. The IRS is doing their best to provide you with online access to your records. You can now communicate directly with the IRS by signing up for their new "Get Transcript" at www.IRS.gov/Individuals/Get-Transcript. You'll be able to access wage and income documentation, prior-year returns, and any outstanding balances.

3. **Delivery method.** Please send all your documents together and please send them to us in <u>one consistent format</u>. If you mail us your documents, we do not also need them emailed or uploaded, this causes confusion and we have to compare both sets which takes extra time.

   a. Do not take pictures of all documents and email/upload them, pictures are time consuming to download and often unreadable. We prefer PDFs. Driver's license is the only exception.
   b. If you send documents electronically, please use our secure portal, if you do not have a portal please email Cassandra at Assistant@MGAssociatesLLP.com so she can create one for you. While we automatically receive an email letting us know you have uploaded documents, please email Cassandra directly to let her know when you have **completely uploaded** your documents so that she can go through everything at one time and determine if anything is missing.

4. **Limit email exchanges.** Sometimes we will request additional information or explanations – please be complete in your responses. Multiple email exchanges and questions at the end of the return preparation process requires time and will be billed in addition to the return preparation fee.

5. **Order of completion.** Our policy is to work on returns in the order they are received, substantially complete, in the office. Please consider the time constraints that we are faced with during tax season. Do not request "rush service" if you were unable to turn in your documents earlier. Also, returns on extension will take longer to complete than those done during tax season. After tax season we have a multitude of other responsibilities and cannot solely focus on returns.

6. **Extension of filing.** Not all returns can be filed by Tax Day because of late arriving information (out of your control) or backlog in our office. Complete returns received late in the office are not guaranteed to be completed by Tax Day. Please be aware that there is no increased risk of audit for extended returns. However, any taxes are still due by Tax Day which may require (if time permits) some additional work to determine a tax extension payment. Our office is not responsible for any penalties for underpaid taxes.

   a. All returns requiring extensions will be sent an Extension Agreement which must be signed and returned to our office before we can file the extension.
   b. Our office will now require a minimum $350 retainer on any return that we received the information* too late to file by Tax Day.
   c. There is a $400 fee for extended returns that we have not received information* for by June 15th.
   * Please note this does not include information beyond the client's control such as K-1's and investment statements.

7. **Late changes to your return.** Once your return is completed there will be charges for "forgotten" and/or information that require a re-work of the return.

8. **Phone call vs email contact.** Due to the heavy volume of work and the level of concentration required to produce error free returns we ask that you present your questions **via email and not through a phone call**.

It is our goal to process your information and turn around your return as quickly as possible. We do our best to streamline the process and your cooperation in these areas will help us to serve you better.