Langley and Associates LLC

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Dear [FIRST_NAME],

Happy New Year! We are busy preparing for another successful tax season. Please read this letter in its entirety to ensure the most accurate and timely processing of your tax return. Additionally, a list of Tax Season Best Practices is attached to this letter. Let's get started!

We are finalizing the TaxDome organizer, and it will go live within a few days of this letter being sent out. While we used TaxDome last year, we were unable to roll out some features in time for that tax season but can do so now. It is still a work in progress, so if you have any suggestions that would improve your TaxDome experience, or think should be added, please let us know. If you notice anything in the organizer that does not work right or is causing issues, please let us know.

1. **We recommend completing the tax questionnaire in TaxDome.** We have made it as user-friendly as possible, and you will be prompted to upload your documents within it. It is a smart organizer, and you can choose between a simplified or more detailed organizer experience. The simplified version is essentially the same as filling out our intake forms in the office. The length and complexity of the detailed version will adapt to match that of your return. While it can be a long form, it saves as you go and there's no need to complete it all in one sitting. **The smart organizer rolls over the information to the next year, so after the first year you only need to update what changes**. Investing the time to answer all questions provides us with the key information we need to prepare your tax return(s) efficiently and accurately. *If you'd prefer a paper questionnaire and organizer, contact us ASAP, or download the needed forms available on our website.*

2. **Pay your bill to access the signature forms.** Payment (or an arrangement) is required prior to electronically filing your taxes. Now, once your tax return has been delivered to your TaxDome account, you will be prompted to pay your bill prior to signing the required e-file authorization forms. **You will still be able to review your client copy prior to payment**. If you need a payment arrangement for your preparation fees, please let us know (additional fees may apply).

3. **Notify us ASAP for extension filing.** We must know if you need us to file for an extension for you by March 21, 2025. In order to calculate any taxes owed, please provide all available tax documents when requesting an extension. Extensions will only be filed for those who are in our return preparation pipeline or have requested an extension.

4. **Prices for return preparation will increase by around 20% for existing clients, and we must now charge for certain forms and worksheets.** A fee schedule will shortly be available on our website and shows the current prices for new clients. By the next tax season, all fees and billing will be in line with the fee schedule. There will still be returning client and early season discounts.

IMPORTANT NOTES:

- **Document Submission & Deadlines**
  - <u>Document submission deadline.</u> Tax documents must be submitted by **March 21, 2024**, otherwise we will have to file for an extension on your behalf.
  - <u>Preparation of your return will not begin until all documents are received, and an engagement letter is signed</u>.

    - We operate on a first-come, first-served basis. Help us prevent delayed completion and keep your return moving by providing all or most of your documents at one time.
    - Be as responsive as possible with us during this time. Unresponsiveness can delay completion of your return. Please add our office number and email addresses to your contacts and regularly check your email's spam folder.
        - ***Pro-tip:*** Download the TaxDome Client app on your smartphone to receive notifications of new messages!
    - Summaries are preferred and appreciated. Whether it be business income expenses, itemized deductions like medical expenses & charitable contributions, or the like, summaries are preferred. Doing so will help keep the cost of your return preparation down. We will be making available worksheets and templates to help you do this, and the detailed version of the TaxDome organizer handles this as well. If you would like a proforma worksheet based on your prior year return, please let us know and we will work with you on providing it.
    - Langley and Associates will not accept responsibility for a client's failure to make timely or adequate tax payment(s). If you wish to have tax payments, extension payments, or estimated tax payments drafted from your bank account, you must inform us, otherwise the return or extension will be filed without payment. We can also provide instruction on how to pay by other methods. After March 21st we may not be able to assist in calculating recommended payment amounts.
    - Please be aware that Brokerage Statements may arrive late or be amended. In the past two years many brokerages have either sent their statements out later in the tax season or are amending them between March and May. If you receive an amended statement after filing your return, we can amend it for a minimal fee.
- **Communication & Secure Information Exchange**
    - TaxDome is to be used for all sensitive information exchanges. We take your privacy and security seriously. Please send any sensitive information through TaxDome (i.e. SSNs, dates of birth, EINs, Identity Protection PINs, IRS Notices, etc.) as it is protected and secure, unlike email and fax.
    - We request that anyone still emailing Ted or other staff at any email address other than one ending in @tedlangleycpa.com to please stop sending to those addresses and only utilize the firm's @tedlangleycpa.com email addresses.

We will soon be adding a Client Resources page to our website that will contain helpful worksheets, templates, forms, links, and more! We are attempting to add fillable versions of those PDF forms as well and will be rolling out those versions as they are completed.

We highly value our client relationships. We sincerely appreciate your patronage and as always, we strive to provide you with professional and efficient service.

If you have any questions regarding this information, please feel free to contact us at 251-345-4800 or via email to office@tedlangleycpa.com. Our public business hours, during which we can take appointments and respond to phone calls, are Monday through Thursday from 9:00am – 4:00pm. Fridays, and times outside of that window, are reserved for us to work without interruption.

Best,

The Team at Langley & Associates