



www.ACT-CPA.com ~ 508-230-8756 ~ 50 Oliver Street, Suite 215, N. Easton, MA 02356

Welcome to our tax and financial planning family!

We are here to serve you to make your taxes less taxing and help you feel more abundance. Please feel free to ask us how!

We work on a first come, first serve basis which means that as the tax season goes on, we get a longer work pipeline and hence the time to complete your return will take longer.

For us to start work on your tax return, you must complete the “Engagement Letter & Tax Worksheet” as well as provide a payment method. Note all the worksheets you will need, you can find on my “tax time info” page on www.ACT-CPA.com. When you have all your information gathered, here are your choices:

- you can upload it to our secure portal (see my website for details), or
- fax them to 1-888-405-8433, or
- drop it off at the office with an appointment, or
- use a mail service that will track the package.

We look forward to serving your accounting, tax and coaching needs for many years to come.

Blessings of Abundance,

Debbie

Deborah R. Bowman, CPA

Tax Preparation Fee:

We will quote a fee to you upon seeing last year’s tax return.

Please call the office with any questions at 508-230-8756.

Checklist of items needed to prepare your taxes:

- ACT CPA Engagement Letter & Tax Worksheet (on website) – fill out and sign.
- Your Official Tax Documents – W2, 1099s, K1s, 1099-B, 5498, 1098 etc..
- Provide your healthcare information via 1099-HC or 1095-A
- Provide additional information on our tax worksheets (see website) or your own format.
- Enclose your payment via a check payable to: “ACT CPA” or complete the E-PAY Form (on website).