



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](http://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 1-888-374-3132 (new#), 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 or email at [wecare@act-cpa.com](mailto:wecare@act-cpa.com)

### **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..
- Charity Donations receipts for all clients even if you don’t itemize
- 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).