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## *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 join our email newsletter to learn more about our abundant solutions.

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. We will quote you a retainer fee to start with for an approximate cost to prepare.

Note all the worksheets you will need are found 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 , or
- drop it off at the office with an appointment, or
- use a mail service that will track the package.

Upon completing your return, we will upload it to our secure portal for you to review and sign the e-file forms. We will not e-file your return without your signature on the e-file forms.

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

Blessings of Abundance,

*Debbie*

**Deborah R. Bowman, CPA**

### **Checklist of items needed to prepare your taxes:**

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