



Working with atlanta.tax



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Atlanta.Tax Client Experience

Welcome to Atlanta.Tax! We're happy to be working with you. Our goal is for our relationship to be as productive and enjoyable as possible. The following information outlines what you can expect from us as well as what we need from you to meet those expectations. Important, supplemental information, such as tax season timing and guidelines, is included in this document as well.

What You Can Expect From Us

- **We will uphold our core values in all relationships.** You can read more about these [here](#). In summary we aim to: be useful, keep you informed, be an integral part of your team, and take an interest in your financial life.
- **No surprise bills.** Most of our engagements are covered under one annual, upfront fee. For needs outside of that arrangement, we will discuss them as they arise, including related pricing.
- **Reasonable response time.** We return emails within 24 business hours unless we are out of the office for training or vacation days. We may not have an answer to your question within 24 business hours, but at the very least you'll receive an acknowledgment of your email with an expected resolution time frame. Voice mails are returned within 3-4 business days outside of tax season excluding out-of-office responses for training and vacation days. During tax season, time constraints generally do not allow us to respond to voice mails; we will email you to schedule a phone call.
- **Reasonable turnaround time for your tax returns and other projects.** Tax returns are generally completed and available for your review within 2 weeks after we receive the last piece of pertinent information. Tax projections are generally completed and results communicated to you within 3 weeks after we receive the last piece of pertinent information.
- **Confidentiality.** We treat your confidential tax information with care. This is accomplished in a variety of ways, including exchanging and storing data using industry-leading software. We will not discuss your tax situation with anyone outside of your financial and legal team without your permission.
- **Education.** We understand that taxes can be stressful, time-consuming, and needlessly complicated. We believe the best way to alleviate these concerns is by providing various strategies and educating you on the pros and cons of each, so you can confidently make optimal choices.



Atlanta.Tax Client Experience

What We Need from You to Meet Those Expectations

- **A Solid Team.** For us to provide our best advice and service to you, you should have an appropriate financial and legal team in place or in the works. For example, for business owners, this typically includes a bookkeeper and corporate attorney and often an estate planning attorney and financial planner. Solid tax advice is best given – and sometimes only possible – in the context of your broader financial and legal situation. We are not bookkeepers, attorneys, insurance agents, bankers, or financial planners. We rely on a partnership with these team members to give you the best service we can.

- **Frequent Updates.** For us to keep you informed, we need you to keep us informed. Please let us know as far in advance as possible of any significant changes to your employment, business, family, legal, or other relevant situation so we can work through the tax implications. If you're behind on monthly accounting work, scheduled tax payments, or any other activity that would impact your tax situation or filings, please reach out to us soon after such issues manifest so that we can work through a solution in advance of any related deadlines. There's no judgment on our part – our experience has been that these sorts of things often happen to the best of folks. The longer these matters continue without our knowledge, however, the fewer and less palatable resolutions become.

- **Accurate Financial Statements.** For business owners, the backbone of tax planning and tax return preparation is accurate and current financial statements. For us to provide meaningful, tax-related insight, we need you to keep up with your accounting on a monthly basis.

- **Timely Response.** For us to provide helpful and timely advice, we need you to respond when we reach out. It's been our experience that the more time that passes between communications on a given issue, the more likely the following will occur:

- Confusion around the issue and related resolutions
- Resolution options expire or are not available in a time crunch
- Deliverable timing cannot meet established expectations
- Time, energy, and other resources are wasted due to the need to revisit issues

We do not have a hard and fast rule regarding client response time, but as a guideline request a response within 48 business hours regarding tax returns and within one week for other matters. The context of the situation will also factor into a reasonable response time.

- **Electronic Communication.** We use electronic means to work together and exchange data. If you're comfortable chatting on the phone, emailing, and accessing information online, you'll be just fine.



Important Things To Know

- **Although we do not provide payroll, bookkeeping, financial planning, or legal services, we have relationships with such advisors with whom we would be happy to refer you.**

We do not receive any compensation from outside parties for any referrals we make.

- **If you owe tax with your returns, we generally recommend that you pay close to the due date, but not too close.**

Taxing authority payment websites have been known to get overloaded and shut down, and you can experience issues with your payments. For example, if your payment is due on April 15, we advise making your payment by April 10 to provide a few days to work out any payment issues that may arise.

- **You may receive a tax notice from the IRS or other taxing authority.** Such “love letters” are a normal occurrence and may or may not indicate any issues with your tax account. In the event that you receive such correspondence, please forward it to us promptly, and in its entirety, so that we may review and advise you on appropriate action.
- **We are happy to prepare your 1099s.** We send reminder emails in December and require that all information be furnished to us by January 10 to ensure a timely filing by January 31. It is a good practice to request completed W-9s from all independent contractors, attorneys, and landlords during the year as these are more difficult, if not impossible, to obtain later in the year or in the following year.
- **We are typically unavailable for in-person meetings.** Any in-persons are typically available only to current clients in the Atlanta area. Additional fees apply to such meetings.



Tax Document & Return Guidelines

We establish guidelines for how and when clients provide tax documents which, in turn, allows us to provide useful and timely service to all our clients. This is particularly true during tax season when we complete the majority of work for most of our clients. As you're gathering your tax information, keep the following guidelines in mind.

- We prefer to receive tax information electronically, either via email for non-confidential information or through our online document portal for confidential data. In the event you're unable to provide documents electronically, we will accept paper copies of your original documents. Please do not send us any original paper documents as they can be delayed or lost in transit, creating more headaches than if copies are delayed or lost.
- We generally do not need receipts of any kind, including those for business, rental, and personal deductions such as medical expenses and charitable contributions. Business and rental activity should generally be provided via completed financial statements or profit and loss summary. Personal deductions can be sent in an Excel or Word document. Keep receipts for your own records in event of audit, but do not send them to us unless specifically requested.
- For business returns - C Corporations, S Corporations, and Partnerships - we are unable to accept a list of transactions in lieu of completed financial statements. For Schedule C (business) & E (rental) filings, we are unable to accept a list of transactions in lieu of either completed financial statements or a profit and loss summary.
- Please provide all forms W-2, 1099-B, 1099-DIV, 1099-INT, 1099-R, 1099-S, 1098, 1098-E, and 1098-T.
- For business tax returns, we generally do not need your 1099-MISC forms that you receive from your customers or clients.
- Please provide each document only once, unless you receive amended versions of your 1099-B, K1, or other form.
- If you are at all uncertain whether a document needs to be provided, do not hesitate to ask.
- We advise you download and store your tax returns and documents on your own hard drive or server for ready access rather than relying on our document portal for future access. For example, our document portal could be down for maintenance at the same time you want to send a tax return to a lender for a refinance.



Tax Return Process: Personal

Steps in the Personal Tax Return Process

- 1. You will receive an engagement letter and invoice electronically.** Your executed engagement letter and payment indicates your intention for Atlanta.Tax to complete the projects detailed in the underlying services proposal. To ensure that we are not working on projects that you have not approved, no work will be done by us until a fully executed engagement letter and payment are received.
- 2. You will receive an annual tax questionnaire to complete and return.** The questionnaire asks for standard information (i.e. dependents, birthdates, etc.) as well a few pages of yes and no questions about activities that may have tax consequences. This completed questionnaire helps us uncover tax issues that might not be readily apparent from viewing tax documents so they can be addressed as needed.
- 3. As tax documents become available, please provide them via our online document portal.** Although some items, such as brokerage statements, may not be available until February or March, most other items can be provided before then including business financials, W-2s, 1099-DIV/INTs, itemized deduction information, completed tax questionnaire, etc. Submitting documents as they become available allows us to address any related concerns in advance of filing deadlines, as well as minimizes the need to extend your returns.
- 4. As we prepare your tax returns, we will contact you with questions and requests for additional documents.** We attempt to make such communications as succinct and minimal as possible, without sacrificing return accuracy and/or results that are in your favor. It is likely we'll have a little bit of back-and-forth as your answers may lead to new questions. One or more phone calls may be advisable during this process.
- 5. Depending on time of year, availability of documents provided by third-parties, your availability to collaborate with us, and other factors, your returns may be extended.** In such cases, we will communicate with you regarding timing of extension, payments of any amounts due, and timing of return completion. If your returns require extension, but you have not executed your current year engagement letter and paid your current year invoice, we will prepare a courtesy extension for you based on your estimate of your tax liability. We must have a signed engagement letter and receipt of current year fee payment to calculate any tax balances that may be owed.



Tax Return Process: Personal

Steps in the Personal Tax Return Process

6. When completed, your returns will be uploaded to our document portal for your review. You may or may not have questions regarding your tax returns. If there are no questions, you will approve the returns so we can send you signature pages through our online document signing platform. If you do have questions, those will be addressed either via email or phone call as appropriate. It's important that you do not sign any tax filings without understanding them. If you have any questions, please contact us. We welcome any and all questions.



7. Now it is time to sign and file. Once you (and your spouse, if applicable) have electronically signed the tax return signature pages, your tax returns will be electronically submitted to the IRS and other applicable taxing authorities within 2 business days.

8. It can take a while to process a refund, so don't expect it to arrive right away. If you are expecting a refund with your tax return filings, it can take 8 weeks or more to receive it after the return is submitted depending on the taxing authority, time of year, etc. If you have not received your refund within 8 weeks of return submission, please contact us.



Tax Return Process: Personal

Timing of Personal Tax Returns

Tax returns are deadline-driven. This deadline is April 15th for most individuals. For us to prepare and submit your tax returns timely, with adequate time to address any & all concerns, we adhere to the following schedule during tax season (January – April):

- **We will respond to your emails within 24 business hours.** We ask that you respond to ours within 48 business hours, if possible.
- **From January 1 – March 1, we will complete your tax returns within 2 weeks** from the date we receive your last piece of needed tax information.
- **Once your tax returns are completed, we ask that you review them** and either a) approve them, or b) ask questions within 1 week. If you cannot meet that deadline, let us know when we can expect to hear back from you. Your availability may or may not impact whether your returns will be extended.
- **If all of your tax information is not available by March 15, we will extend your return with the information we have on March 15.** If additional information, including completed business financials, is provided to us on or after March 16, it will not impact your extension.
- **If you owe with your extension, but do not pay at that time, you will incur related penalties and interest.** We will happily calculate extension payments for you as long as you have provided us actual and estimated information by March 15.
- **If your returns have been extended, we will reach back out to you after April to complete them.** If applicable, we will provide you with a time frame for this. If we are waiting on third-party information, we will be on hold until that third-party information arrives. If additional information or documents arrive between when your returns are extended and the end of April, feel free to upload them to our portal at that time. We will update your file with this additional information when we reconnect after April.
- **Outside of tax season (May-December), tax returns will be completed and made available for your review within 1 month of the date we receive your last piece of information.** As such, if your extended due date is October 15, we will need all information to us by September 15 for a timely filing.



Tax Return Process: Business

Steps in the Business Tax Return Process

1. You will receive an engagement letter and invoice electronically. Your executed engagement letter and payment indicates your intention for Atlanta.Tax to complete the projects detailed in the underlying services proposal. To ensure that we are not working on projects that you have not approved, no work will be done by us until a fully executed engagement letter and payment are received.

2. We review your financials. If we do not have access to your online accounting software, you will need to provide us your completed financial statements (balance sheet, profit & loss, and general ledger) in Excel.

3. As we prepare your tax returns, we will contact you with questions and requests for additional documents. We attempt to make such communications as succinct and minimal as possible, without sacrificing return accuracy and/or results that are in your favor. It's likely we'll have a little bit of back-and-forth as your answers may lead to new questions. One or more phone calls may be advisable during this process.

4. Depending on time of year, availability of documents provided by third-parties, your availability to collaborate with us, and other factors, your returns may be extended.

In such cases, we will communicate with you regarding timing of extension, payments of any amounts due, and timing of return completion. If your returns require extension, but you have not executed your current year engagement letter and paid your current year invoice, we will prepare a courtesy extension for you based on your estimate of your tax liability. We must have a signed engagement letter and receipt of current year fee payment to calculate any tax balances that may be owed.

5. When completed, your returns will be uploaded to our document portal for your review. You may or may not have questions regarding your tax returns. If there are no questions, you will approve the returns so we can send you signature pages through our online document portal. (As of this writing, the IRS does not accept electronic signatures for electronic filing of business tax returns. As such, your non-digital signature is required before we will submit your tax returns.) If you do have questions, those will be addressed either via email or phone call as appropriate. It's important that you do not sign any tax filings without understanding them. If you have any questions, please contact us. We welcome any and all questions.

6. Once you have electronically signed the tax returns signature pages, your tax returns will be electronically submitted to the IRS and other applicable taxing authorities within 2 business days.



Tax Return Process: Business

Timing of Business Tax Returns

Tax returns are deadline-driven. The business tax deadline is March 15 for calendar year S Corporations and Partnerships and April 15 for calendar year C Corporations. For us to timely prepare and submit your tax returns, with adequate time for us to address any & all concerns, we adhere to the following schedule during tax season (January – April):

- **We will respond to your emails within 24 business hours.** We ask that you respond to ours within 48 business hours, if possible.
- **From January 1 – February 1, We will complete your tax returns within 2 weeks** from the date we receive your last piece of needed tax information.
- **Once your tax returns are completed, we ask that you review them** and either a) approve them, or b) ask questions within 1 week. If you cannot meet that deadline, let us know when we can expect to hear back from you. Your availability may or may not impact whether your returns will be extended.
- **If all of your tax information is not available by February 15, we will extend your return with the information we have on February 15.** If additional information, including completed business financials, is provided to us on or after February 15, it will not impact your extension. Following this logic, if we prepare your personal tax returns and these include activity from your passthrough business, your personal tax returns will also be extended based on the information we have available on February 15.
- **If you owe with your extension, but do not pay at that time, you will incur related penalties and interest.** We will happily calculate extension payments for you as long as you have provided us actual and estimated information by March 1.
- **If your returns have been extended, we will reach back out to you after April to complete them.** If applicable, we will provide you with a time frame for this. If we are waiting on third-party information, we will be on hold until that third-party information arrives. If additional information or documents arrive between when your returns are extended and the end of April, feel free to upload them to our portal at that time. We will update your file with this additional information when we reconnect after April.
- **Outside of tax season (May-December), tax returns will be completed and made available for your review within 1 month of the date we receive your last piece of information.** For calendar year S Corporations, Partnerships, and C Corporations, the extended due date is Sept. 15. If your extended due date is Sept. 15, we will need all information to us by August 15 for a timely filing.



Tax Planning

A number of our clients engage us for tax planning services, where we devise legitimate and feasible strategies to reduce your tax burden. A good candidate for tax planning is someone:

- a) with complicated and/or multiple sources of income, who
- b) has available cash to pull off tax-savings strategies, and
- c) is willing and able to devote effort and attention to the tax planning process.

Some tax planning is accomplished simply through conversations about activities that generate tax consequences. Another way tax planning is accomplished is through tax projections.

Tax Projections

Preparing a tax projection is a bit like having a dress rehearsal for a wedding, i.e., practice for the real event. Before the end of the year, we will gather actual and estimated information about activities that will impact your tax situation and use this information to answer questions about your estimated tax liability for the year and options for reducing it, if applicable.

What You Need to Do

Tax projections require effort on your part. You'll need to gather information including your current paystubs, financial statements, real estate closing documents, etc. Additionally, we will ask you to estimate your full-year business activity, investment activity, and so on.

Timing

We have two tax projection seasons, one in late spring and summer and one in the fall. During these times, we reach out to our tax planning clients to get the projection process started. We also encourage clients to contact us at any point during the year when making significant financial decisions that can impact your taxes, such as an expected sale of a rental property or receipt of a significant bonus from an employer.

We typically complete tax projections in under 3 weeks from the day the last piece of information is received. Findings and recommendations will be provided via email and/or phone call as appropriate.

Keep in mind, all of this work is to give you an expectation and estimate of your tax situation for the year. Your actual results will vary due to changes in your business activity, levels of itemized deductions, etc.



We Welcome Your Questions

We believe that transparency is vital for any relationship to work and hope that this document has clearly set out what to expect when partnering with Atlanta.Tax.

We are delighted to be working with you!
Feel free to reach out to us with any questions.

[Visit Our Website](#)

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