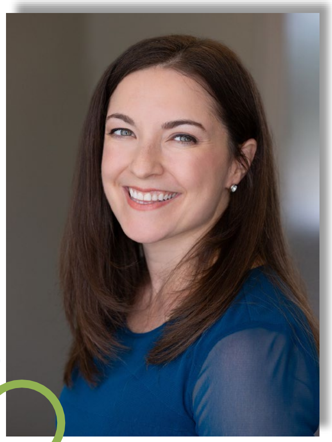
# How to Get Started Working with Atlanta.Tax



Hi! I'm Alicyn McLeod, the founder and owner of Atlanta.Tax. I'm delighted that you're interested in working with us.

We understand that it's not every day you seek a relationship with a new CPA, and you likely have questions about how this process works.

Below are the steps you can expect to becoming a firm client, as well as answers to some commonly asked questions. If you have any questions not addressed here, feel free to ask!

## Becoming an Atlanta.Tax Client

1. **Let's talk!** Client relationships start with a 45 (or so) minute phone call during which we will discuss and clarify your needs and determine if our firm can meet them. In many cases, potential clients enter this conversation with numerous, long-unaddressed concerns which they find confusing and make them feel uneasy. After talking things through and brainstorming solutions, most folks leave that initial conversation educated and relieved. Note that you do not need to send any documents in advance of this call.
2. **Documents.** During our discussion, you'll be asked to provide various documents pertinent to your specific tax situation such as most recently-filed tax returns, current financial statements, business formation documents, estate planning documents, etc. After our call has ended, a secure online portal will be made available to you to provide any requested documents electronically.
3. **Follow Up.** Once you've provided the requested documents, we'll go through them within the time frame established during our initial discussion, typically 2-3 business days. After our review of your documents, we'll detail our findings and recommendations in a follow up call. During this discussion, we'll also provide a fee estimate for working together.
4. **Proposal.** We'll provide a tailored service proposal for your review and approval. Most of our proposals include fixed-fee pricing which covers some combination of tax return preparation, tax planning and projections, as well as on-call tax advice. We encourage you to ask any questions you have about the proposal.
5. **Acceptance.** If you approve of the pricing and services included in our proposal, we will send an engagement letter and invoice along with any questions and/or document requests necessary for us to begin preparing your returns, tax planning or other items outlined in your scope of work.

# Questions Prospective Clients Frequently Ask

**Q** **What do I need to consider when choosing a CPA?**

**A** Selecting a service provider isn't like choosing clothing or a restaurant. It's challenging to find the right fit when it's something you rarely do and when there's not a tangible product to see or touch. We wrote this article to help you out.

**Q** **When do you accept new clients?**

**A** We welcome discussions with prospective clients throughout the year, but due to time constraints do not bring on new clients year-round. Ideally, we onboard new clients in the year ***prior*** to tax filings, but specifically do not onboard new clients between February 15 and April 30. There may also be other times of year that we must pause onboarding.

**Q** **What are your fees?**

**A** Fees vary from client-to-client depending on needs, but minimum pricing is typically around $1,000 a year.

**Q** **How long does it take to go from initial contact to being a client?**

**A** This will depend on everyone's availability for our initial phone conversation, as well as how quickly you're able to provide the documents necessary for us to create a proposal. Typically, it takes approximately a month from initial conversation to signed engagement letter. For more involved issues, such as several years of unfiled tax returns, this process may take longer.

**Q** **Once I'm a client, how long does it take for my tax return, tax projection, etc. to be completed?**

**A** This will depend on the services needed, time of year, and your availability to supply needed information. Timing expectations will be discussed in our initial phone call.

**Q** **What would our relationship look like if we work together?**

**A** We encourage you to read through the information provided here for insight into what you can expect from us and what we'll need from you to meet those expectations.

## We welcome your questions.

We believe that transparency is vital for any relationship to work and hope that this document has clearly set out how to get started with **Atlanta.Tax**.