WoodsTaxes, LLC
P.O. Box 150857
Lakewood, Colorado 80215
(303) 776-0498
diane@woodstaxes.com
www.woodstaxes.com

Office Procedures

Communication – The quickest way to reach me is through email at diane@woodstaxes.com. To schedule a phone call, email me with some days and times that are convenient for you. I welcome phone calls and often phone conversations are more efficient at answering questions. During tax season, I'm typically available Mon-Fri, 9 a.m. to 7 p.m., Sat 9 a.m. - 1p.m. I can schedule outside these hours if needed.

Gathering Information – The Client Organizer and Agreement Letter are available in the portal or on my website. Use the organizer as a guide to compile all the data necessary to complete your return. Refer to last year's return for guidance. Contact me if you have any questions about what you will need.

Items needed - Please upload **all** your W-2's, 1099's from retirement, interest, dividends and brokers, Social Security statements, Forms 1095A for health insurance, mortgage Forms 1098 and any other official IRS documents and the **front page of the Organizer**, which must be completed with all questions answered. A summary page will suffice for charity deductions and medical expenses, rental income and expenses, and business income and expenses. I do not need individual receipts for those items but keep for 4 years if needed for an audit.

Client Portal - The mandatory policy for electronic transmission of documents will be through my client portal on my website. If you want to send documents electronically, you must upload the documents into your folder at **www.woodstaxes.com**. If you don't have a folder set up, call, or email me. The safety of your information outweighs any inconvenience. I will be implementing a "no click" policy, at the recommendation of security advisors to the industry. **This means I will not open any documents you send me via email or** through text messaging. For those of you who can't use the portal, you can **mail *copies*** (not original documents) to the PO Box listed above.

Processing your return - **Tax preparation will not be started until the Tax Organizer, Page 1, is returned to me.** Even if you are missing some items, go ahead and send most of the items as soon as possible to start the process. If you have any new changes from the previous year, we can have a phone call to discuss. I will reach out to you if any item needs clarification. Once your return is ready, I'll contact you by email that your return is in your folder for your review, and I will send you a link for an electronic signature for the tax returns and the Agreement Letter.

Timeline - My turn around time depends on several factors: when you get me your info, how organized it is, my current workload and when any missing info is sent to me.

Fees – My billing is based on the complexity of your return, the forms required, and how organized your documents are. I do not charge for the quick (15 min or less) phone call/email answering your questions during the year. If your question involves calculating a specific amount or dealing with a complex issue, then it becomes billable. Call or email if you want a quote.

Payment is expected at the time of filing, and you can pay one of two ways:

- check to "WoodsTaxes, LLC" mailed to P.O. Box 150857, Lakewood, CO 80215-0857
- debit or credit card, use the "make a payment" button in the client portal.

Thank you for the opportunity to serve your tax preparation needs.

Diane