WoodsTaxes, LLC
P.O. Box 150857
Lakewood, Colorado 80215
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www.woodstaxes.com

Welcome to WoodsTaxes Virtual Office

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.**

Gathering Information - Attached are the **Tax Organizer and Client Agreement Letter**. Use the organizer as a guide to compile all the data necessary to complete your return. Refer to last year's return for guidance or contact me if you have any questions about what you will need.

Items needed - Please upload all of your W-2's, 1099's from retirement, interest, dividends and brokers, Social Security statements, Forms 1095 for health insurance, mortgage Forms 1098 and any other official IRS documents. Most of these documents can be accessed electronically and you can copy the file into your folder. If you don't have an electronic copy, then scan and upload the pdf file. Working from original documents helps me to insure that the correct amount is reported. Also, upload the first page of the Organizer and a signed Agreement Letter. I'm working on a better electronic version of those documents. A summary page will suffice for itemized deductions, rental income and expenses, and business income and expenses. I do not need individual receipts for those items, but keep for 3 years for your records.

Processing your return - Even if you are missing some items, go ahead and send the majority of the items as soon as possible in order to start the process. If you have any new changes from the previous year, we can have a phone or Zoom 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. Reply to that email when you are ready to sign the return for electronic filing and I will send you a link for an electronic signature.

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

Fees – My billing is based on the complexity of your return and the forms required. 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 on my website, www.woodstaxes.com .

I certainly will miss meeting with you and hope that we can stay connected in the virtual world that we are entering.

Kindest regards,

Diane