2025 Firm Policies

<u>Engagement Letters and Client Information</u>

Until an engagement letter is signed, dated, and returned to our office with the required boxes marked (last page of engagement letter), no work will begin on the preparation of your tax return(s).

Please note that tax returns are processed in the order in which our office receives client information. If you have not received all your information (i.e., K-1s not prepared by our office) by the information due dates listed on the *Important Yearly Updates* insert, please provide our office with all the information that you do have prior to this date. If you turn in your information around the information due date, please understand that your return will be processed close to the due date of the returns. <u>All due dates are firm.</u>

<u>Appointments, Drop-offs, and Pick-ups</u>

Our office is still accepting drop-off appointments on a first-come-first-served basis. Our office also has a mail drop in our door (inside the building) that can be used to drop off your information**. A signed and filled out engagement letter is required at the time you drop off your tax information.** Our office policy requires that we receive this engagement letter PRIOR to doing any work on your returns.

Pick-up appointments times are limited. Pick-up appointments can be done in-person or over the phone. Due to security requirements, our office is currently not set up for video calls. If you would like a pick-up appointment, please discuss the options available with our receptionist, as those appointments will be made once your returns are complete and ready to be signed. All tax returns should be picked up within one week of notification when possible.

We encourage clients who have significant changes in their tax situation to contact our office prior to the beginning of tax season to discuss the issues (December 1 - January 31). This is your tax return and our commitment to our clients is to ensure that you understand your personal tax situation.

Please do not e-mail Lisa to schedule appointments. You can schedule an appointment by calling our office. We receive numerous requests for appointments and the schedule is consistently changing. For efficiency, our policy is all appointments will be scheduled through the receptionist.

We request that you arrive **no earlier** than 5 minutes prior to your scheduled appointment time. If you do not arrive within 15 minutes after your scheduled appointment time, you will need to reschedule your appointment. If you arrive late, your appointment time will not be extended. Please let our office know as soon as possible if you are not able to make your appointment.

<u>Extensions</u>

If you will require an extension, please provide our office with all tax documents that you have available no later than April 1, 2025 so we can prepare an accurate estimate of any taxes due. All taxes are due and payable on the due date of the return and our office is not liable for any interest or penalties for late payment of tax. An extension to file the return is not an extension to pay. <u>Our office cannot file for an extension without your consent unless that consent is in writing</u>. Please download, sign, and return an *Election for Extension* from our website as soon as you are aware that you will need an extension.

<u>Website Policies</u>

Please note that our website (**www.ihandercpa.com**) is used to provide information and documents for our clients. All documents may be updated at our discretion. Information to access our ShareFile Account has been added. For more information about our ShareFile policies, see below.

<u>Email Policies</u>

For security reasons, our office no longer accepts email attachments. *All emails containing attachments will be returned to the sender.* We accept documents by mail, ShareFile, fax, or dropped off in-person.

If you receive an email from our office requesting additional information, please respond as soon as possible so we can complete your tax return in a timely manner. Please allow up to 48 hours during tax season for our office to respond to emails.

<u>ShareFile Policies</u>

If you have not accessed your ShareFile account, please contact our office for a new invite. Identification will be required due to the sensitive information on your tax returns. Our firm **<u>requires</u>** that you activate two-step verification on your ShareFile account. Failure to do so, resulting in a hack or information being viewed or stolen by a non-authorized individual, group, or company on the user (client) end is the sole responsibility of the client. Please save the following URL to log in to ShareFile: **ihandercpa.sharefile.com**.

Your ShareFile folders will be updated in our system after your tax return has been filed. As such, all documents uploaded to *Client Uploads* will be removed. Please keep all hard copies of the information that you upload, as a hard copy will not be provided by our office. You are required to retain your tax source information for seven years. We suggest retaining a copy of your tax returns indefinitely. In the event that you require a copy of your prior year tax returns, please know that you will be directed to pull that information off of ShareFile.

Please note that our firm will not retain any tax returns older than the required seven years. Prior years will be securely deleted from our system. In the event that a previous tax return is required from the last seven years that is not available on ShareFIle, a request can be made to our office. For security, ShareFile will only retain the past three years of tax returns. All previous years (2020 and prior) will be removed no later than January 31, 2025.

If your tax return is delivered via ShareFile, an email will be sent to the address we have on file to inform you that your information has been uploaded and instructions will be provided on your transmittal letter. Please carefully follow the instructions as there will be documents that our office requires to be returned, the invoice for your preparation fees and you may have tax payments due.