

## **SBS Tax Services**

443-614-6877

[yourtaxpro@sbs.tax](mailto:yourtaxpro@sbs.tax)

[www.sbs.tax](http://www.sbs.tax)

I wanted to take this opportunity to thank you for your continued loyalty and trust in our tax preparation services. Most of my clients are already aware that Angie and I moved to Florida this year. This will mean a new way of doing business. For most clients it will mean more convenience with the same level of dedicated service. However, with change brings uncertainty. The information below is meant as a way to ease that uncertainty and explain how completing your taxes remotely is more secure and more convenient. In fact, some clients elected to do their taxes remotely last year as a way to **save money and time**.

### **How will I make an appointment?**

Just call 443-614-6877. If I am not immediately available, I will call back as soon as possible. I will go over the steps to send me your tax documents as explained below. Once I receive your documents, I will call to set up your appointment, which can be completed from the convenience of your home. That's right, no more traveling to Princess Anne – you can do this from home in your pajamas. **That's the convenience**.

### **How will I send you my tax information if you are in Florida?**

There are two ways to send me your tax information. (electronically or via mail)

1. I will send you a link via email which will allow you to send me a "secured" copy of your tax documents (w-2, 1099, etc) AND will ask most of the same questions I asked in the tax office. You would need to use your phone to take a picture of the documents or scan them to a pdf file. You will need to provide an email address for this free service.
2. You can snail mail me a copy of your tax documents to 332 Waldorf Drive: Auburndale, FL 33823. Please do not send original documents.

\*\*\*\*\*Once you send your documents be sure to text me at 443-614-6877 indicating that you sent them and the date.

### **After I send you my tax information what is next?**

I will start your tax return, completing as much as possible, based on the answers and documents you provided. Once that is completed, I will call to either finish the return, if you have time, or set up an appointment to complete the return.

### **How long will it take from the time I send you my documents until I receive a call from you?**

My goal is to provide a 3 day or less turnaround time, once I have all the information needed to complete your return. If, for any reason, I cannot provide a 3 day turnaround time, I will call with an explanation and expected turnaround time.

### **How will I sign my return?**

There are 2 ways you can sign your signature forms

1. If you have an email address, I will send you an electronic DocuSign signature form, which you can sign electronically on a PC, Laptop, Tablet or smart phone. There is NO charge for this service. OR
2. I can mail you a copy of your signature forms with a self-addressed stamped return envelope, which you will need to sign, date and return before I can e-file your tax return. There is a \$10 fee for this service.

### **How will I receive a copy of my tax information if you are in Florida?**

1. I will send a secured copy of your completed tax return to your email address at no cost. OR
2. For a \$25 fee, I can print, assemble and mail a copy of your return to your home address.

### **Will there be any other changes?**

Yes, because I do not have the overhead of the office and utilities, I am able to pass these savings onto my clients with reduced fees this year. The amount will be dependent on the type of return and complexity of forms, however, all clients should see a lower fee. **That's the savings**.

### **How will I pay for your services?**

All fees will need to be paid via debit or credit card over the phone.

### **I really want a face to face tax prep experience.**

Unfortunately, because of my physical location I will not be able to provide a face to face service in the future. I understand there will be some clients that want the face to face visit. Unfortunately, I will not be able to provide this service in the future.

*William (Willy) C. Sproul*