



TAX TIME!

Whether you are a new or loyal client of The A.C.T. Group, we thought it would be helpful, right from the beginning, to answer some questions you may have.

If you have not already done so, please take a few minutes to visit our website and online documents that will make your tax preparation go more smoothly at <http://www.actgroup ltd.com/resources/>. You will need to accept the terms of the engagement letter to access these documents. Please also complete the Tax Organizer which is helpful when gathering your documents!

Also, listed below are a few highlights of our FACT Sheet and other information which you might want to know immediately:

- E-Filing continues to be mandatory. You will be able to retrieve the e-file authorization forms through our secure portal (SmartVault). After your returns have been reviewed and paid for, you will also be able to access your tax returns through our SmartVault portal 24-7. (Tax returns will not be e-filed until authorization forms have been signed and the tax preparation fee has been paid.)
- If we gave you an estimate for our tax preparation fees, please remember that our fees are based on actual time spent on the returns, which includes data entry, processing, etc. and we will do our best to stay within the estimated amount.
- Our fees allow for a limited amount of time for questions to be answered about your returns after you have reviewed them. You may be billed additionally for extra time spent answering questions about the returns.
- We are not responsible for original documents. It is preferable that you give us copies. **When uploading documents, PLEASE CONVERT JPEGs to PDFs before sending. Uploading documents to SmartVault is safe and secure.**
- Please do not give us receipts, but rather, add up your expenses and give us the totals by category. You will find our Organizer to be very helpful, and might realize a cost savings if a staff member does not have to bill you for totaling and analyzing receipts.
- Please remember that you are responsible for the information on your returns. So, it is important that you review the returns before we e-file.
- As mentioned above, we will expect payment upon release of your tax returns. This has proven to be a cost effective measure for us, which will ultimately be passed on to you! We accept cash, checks and credit cards.
- If you e-mail documents to us and do not receive a confirmation or response e-mail from a staff member of The A.C.T. Group shortly thereafter, please contact us to ensure that we received your documents.