

Tax Year 2017 Tax Preparation Client Procedures

1. Working Remotely- Eddy Company will work remotely this tax season. Please see below fees if you cannot use technology to work remotely. Working remotely securely via the internet is the quickest, most efficient method of completing your tax return and filing it in a timely manner. You will soon be sent a Dropbox for Business invitation which will include a folder to upload your 2018 tax return backup documents to. There are several smart phone applications (Tiny Scanner, Camera, etc.) as well as a desktop/laptop scanner with which you can easily scan documents and upload them to Dropbox. Please notify Eddy Company at the following address once all documents are uploaded so that we may begin preparing your return: info@eddycompany.com
2. Documents Required- See the following link for helpful tax and financial planning articles, newsletters, and other helpful documents:

<http://eddycompany.com/documents/>

1. Pricing- The minimum charge for a very simple 1040 (individual/joint) tax return for 2017 tax year is $275.00. Please ask for charges for business and non-profit returns (individual returns with Schedule C, S-Corps., C-Corps., 990’s, etc.). Additional charges may be assessed for additional forms/services as described in the following non-inclusive list:
* Multiple W2’s
* Multiple 1099’s
* Multiple state filings
* Rental properties
* K1 entries
* Client copy paper return copy mailings
* Other services and forms not listed above

Please contact the firm for a price range estimate based on your specific tax return situation.

1. Engagement Letter- Once an agreement has been established to hire Eddy Company for tax services, an engagement letter will be emailed to you for an e-signature. The engagement letter e-signature service requires a 4-digit passcode that will be sent to you in a separate email.
2. Preparation Timing/Filing- After electronic receipt of all tax documents, your return will be prepared and filed in a maximum of approximately two weeks (after January 23, 2018 federal e-filing opening date). A completed copy of your return will be uploaded to a separate folder on Dropbox for Business, where it can be downloaded and/or printed. All returns will be e-filed when completed. A confirmation of e-filing will be emailed to you at that time.
3. Deadlines for document submission- After the following dates, Eddy Company, can no longer accept documentation for on-time tax year 2017 filing, and you will be offered, at a cost of $100.00, extension filing services:

Form W2 and 1099 filing: 1/15/18 (considered filed late after 01/31/18)

Form 1065 (Partnerships): 03/01/18 (considered filed late after 03/15/18)

Form 1120S (S Corporations): 03/01/18 (considered filed late after 03/15/18)

Form 1040 (individuals/joint): 04/01/18 (considered filed late after 04/17/18)

FBAR (Foreign holding): 04/01/18 (considered filed late after 04/17/18)

Form 1041 (Trusts & Estates): 04/01/18 (considered filed late after 04/17/18)

Form 1120 (C Corporations): 04/01/18 (considered filed late after 04/17/18)

Form 990 (Non-Profit): 05/01/18 (considered filed late after 05/15/18)

1. Special Offers- Eddy Company is offering the following offers to new and existing clients for the 2017 tax season:
2. Referral Bonus- Refer a new tax preparation or accounting client and receive $100.00 off final tax preparation charges.
3. Free Tax Preparation- Open and fund an investment management account in a minimum market value of $50K or more and receive free tax preparation for the duration of life of open and funded investment account.

Eddy Company sincerely appreciates your business for this 2017 tax year filing season. Thank you for your cooperation in making this a successful tax season. Please contact us with any questions or concerns.

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