



CALIFORNIA TAX BOUTIQUE

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Dear Tax Client:

We are exceedingly excited to announce that we are taking our tax practice to the next level!

We now have one central site for you to login and update your personal information, upload documents, see which preparer has been assigned to your return, review your tax return, electronically sign it, make payment, and receive confirmation of filing. **You can download a PDF scanner to your smart phone for FREE.*

Our site will hold all your tax information for each year we do business from now to the future. You will be receiving an email from us between January 3 and January 10, 2018 to sign up for our site. (We highly recommend signing up for this, our goal is to have 100 percent of our clients on this system within 3 years)

We are no longer accepting any faxed or emailed tax documents. If you wish to send us tax documents, you must upload them through our client portal. This will ensure that we receive all your necessary documents in one place making it easier to expedite filing your return.

New Appointment Option: Instead of having to call our office, you can schedule your appointment online through our website. You will be able to select your type of return, the preparer you want to work with, and the location you would like to be seen at. This new system allows you to cancel or reschedule your appointment online. Further, you will receive an appointment confirmation text message and a text message reminder prior to your appointment.

Rates: Our rates have changed this year. A \$80 return includes a Federal 1040, 1040EZ and State Return 540 without itemized deductions. The Schedule A, itemized deductions will now be an additional \$20 and Unreimbursed Employee Expenses will now be an additional \$65. Please see our website for a detailed breakdown of our rates.

New Payment Requirements/Options: This year, we will require payment in full before filing your taxes.

For those of you that prefer to **pay with your refund**, we now offer, for a fee, to deduct your tax preparation fees directly from your refund. Please note that there will be an additional \$85 fee to pay with this option. Small advances from your refund are also available. If your advance application is approved, our office can advance up to \$800 on to a Walmart debit card or our office can issue you a check up to \$800. Please note that there is an additional \$110 fee for this option.

Other Services: We are eager to announce that our office is now offering Tax Resolution services. If you need help with tax resolution, penalty abatement, payment plans, etc., we can help. Additionally, we offer new business consulting, investment help, tax planning, retirement plan tax savings, late filers, amended returns, and more.

Mistakes: We are tremendously sorry if a mistake is made on your return. If a mistake is made on your return, we will fix it at no charge to you. Please bring it to your preparer's attention right away. **If you receive a love letter from the IRS please contact our office immediately, so we can address their concern. Please do not just pay a supplemental bill. Sometimes it is an easy fix. We will gladly pay interest and penalties if it is our mistake. However, we are not responsible for not the tax that would have been due or repaid taxes you received in error.

Referrals: We appreciate that you are very generous with referrals each year. We try and provide an experience that you are not able to get at a large franchise store. We also pride ourselves on having better prices then you would expect to pay with a CPA.

Our Team: Tracie L. Baiz, E.A., Owner, Enrolled Agent & Accountant
Tiffany Baiz-Rogers, J.D., Co-Owner, Tax Preparer & Recent Law School Graduate
Angela Lunsford, Tax Preparer & Customer Service
Rowena Dizon, Tax Preparer & Experienced Accountant
Daniel Williams, Tax Preparer & Experienced Accountant

Tax Deadline: To make sure your taxes are filed on time, please provide our office with your documents **no later than April 7, 2018**. If you wait until the last minute, you run the risk of not getting filed on time. If you cannot get your documents to our office on time, please let us know. We will gladly file an extension for you. If you are a complex filer and waited to bring in your documents, you will be charged a **RUSH** fee of \$50 or you will have to pay for an extension.

Extensions: If you would like to file an extension, your tax owed is still due April 17, 2018. However, your new filing deadline will be moved to October 16th, 2018. Our office will need your forms by September 25th to make the extended deadline. Extensions are \$20 for personal returns and \$50 for corporations.

We are looking forward to seeing you all again soon.

Very truly yours,

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TRACIE L. BAIZ, E.A.