



Welcome and **THANK YOU** for choosing Ledger Medial Accounting Services to help you with your tax project. We look forward to a long relationship and pride ourselves on exceeding expectations.

Use this to guide you through the onboarding process.

You should have received an invite to set up a personal and secure online portal. If not, please check your spam folder. When it asks for the ***last four of your social you will instead enter 1111*** and a personal password that you choose.

To get started please complete the attached form and upload it into the portal along with any other necessary information such as a balance sheet, P&L, Articles of Organization, and a copy of your prior year tax return if applicable.

If you need to give us access to your QuickBooks online, please send an accountant's invite to ledgermedialsubscriptions@gmail.com

PLEASE READ!

Our prices stay low because of our dedication toward efficiency and simplicity. Please do not submit poorly photographed documents, shoeboxes of receipts, and respond timely to our requests for additional information (check your email as we more than like will have a question or two).

Hints to help...

- *Adobe Scan is a free app that allows you to scan documents on your phone.
- *Submit your information all at once if possible.
- *Submit your information as early as possible. We operate on a first-in/first-out basis.

Sincerely,

Matthew L Green

Matthew L. Green MBA, Enrolled Agent
Founder & President