



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.

Also, please find the following forms:

01 – **New Client Profile Form.** Please complete this as thoroughly as possible.

02 – **2022 Return Checklist.** Most answers will be “no” and it should only take around 10 minutes to complete. If you are reasonably confident it is “no” select “no,” however, if you are truly uncertain leave it blank and we will reach out to you to discuss.

****Also upload a copy of your last filed tax return (if possible).***

Other information to upload into the portal – any information that is necessary to complete the tax return. This generally includes anything that says W-2, 1099, 1098, 1095, or revenues and expenses for your business and/or rental property. The checklist will help with this.

PLEASE READ!

****Upfront individual tax prices are for the sake of transparency and guidelines. Earned income credit/child tax credit do not incur fees directly, yet give an idea of your potential bill in relation to time involved.***

Do not submit poorly photographed documents or shoe boxes of receipts yet do respond timely to our requests for additional information (check your email as we more than like will have a question or two). Overly high-maintenance, unorganized, or unpleasant clients will be billed at \$150 per hour - ***we avoid this if at all possible and is extremely rare. A Schedule C business that requires significant QuickBooks cleanup will NOT be \$120!***

Other 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. If you are waiting on a document or two that is fine.***

****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