



*Sartell Tax & Accounting
Services, Inc.*

Making taxes less puzzling!
320 - 656 - 9021

Hello everyone. Tax Season has arrived again and we are looking forward to another year of helping you with our area of expertise. This is what we love to do and look forward to making your taxes less puzzling. Diane and Christie have had a busy year with education, new legislation, updating processes, and utilizing new software. Please congratulate Christie on passing her CPA exams! This opens new doors for our firm. As usual we ask that you please read the full letter and fill out all attached paperwork.

- **★NEW★** We have a new, secure, client portal with more interactive options! Please see attached flyer on **TaxDome** for details!
- **★NEW★** We need the attached **engagement letter** signed **BEFORE** we begin working on your return.
 - ☐ You can do this in **TaxDome!** OR Sign the attached physical copy and submit with your tax paperwork.
- **Fill out** the attached physical 4 page **questionnaire** and submit with your tax paperwork OR
 - ☐ **★NEW★ TaxDome** has a smart questionnaire that adapts to your situation. This will help you skip the questions you don't need to answer.
- **★NEW★** We will have a FAQ sheet available at the front desk and online to inform you of the changes that are coming in 2024, 2025 and possibly 2026.

Over the last several tax seasons we have seen over 10 Congressional tax acts which have caused us to invest in thousands of dollars in continuing education classes, additional staff, and improved processes. We have also closely examined the current local market rates along with the hours we work and the constant upgrading of equipment to meet and exceed guidelines set by the government and evolving processes, we found that we have a problem. After careful review of all these factors, we determined that we were not billing enough to compensate for the additional expenses, people and time need to invest in each return. After discovering these problems, we discerned that this has been a growing issue for several years that we have failed to address. It is a difficult decision to make, but we have determined that we must raise our fees and reduce the number of tax appointments we do, both for our own quality of life and in order to more personally and professionally serve those clients who remain with us.

We are still comparable and even lower than most firms in the immediate area. Most businesses we consulted are raising everyone to a \$500 minimum. We have different pricing for appointments and drop offs depending on the forms needed on your return. We have trained in a tax preparer to file returns that **we** have deemed less complex, which don't need a CPA to prepare. These returns **MAY** qualify for a discount at **OUR** discretion. We chose this to keep the fees low for loyal returning clients, especially those with minimal tax forms who don't want to resort to doing their own return.

- **★NEW★** Office hours will be **Mon, Wed-Fri 9am-6pm & Sat 10am-3pm**, or by appointment.
 - ☐ Regular hours and appointments will start January 29th.
- **★NEW★** **We will be closed on Tuesdays to the public, the doors will be locked**
 - ☐ This allows us to make deadlines, process drop offs and other accounting work in a timely manner.
 - ☐ We will still make outgoing phone calls.

REMINDER: We are **requiring** you to fill out the attached **engagement letter, questionnaire**, and bring all original documents. These can be completed via TaxDome on your phone. If we are missing your filled out questionnaire, this will delay our processing of your return and you may incur additional charges.

NOTE: The receptionist does not have tax knowledge.

**BACKSIDE OF THIS SHEET HAS IMPORTANT INFO
INCLUDING SCHEDULED DROP OFF DATE OR APT**

DROP OFF



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We would like to have a drop off turnaround of one week. This can vary
due to the farm and business deadlines, drop off volume, and completeness of paperwork. You will not sit down with an accountant
with this option. You will receive a phone call when your return is being processed or finished.

Paperwork must be received by **March 31st** to or it will incur a \$20 charge due to us removing the drop off discount.

- Drop off options: (1) In the slot in the window that drops into the building (2) Tax Dome upload (3) Mail to PO Box 283; Sartell, MN 56377(4) Fax to 320-252-2430 (5) Hand to the front desk.
- Dropping off early or calling us will not get your return done faster.
- Complete and organized paperwork will help your return get done faster.
- Please pickup within 7 days of completion or you will not receive the drop off discount. *exceptions available
- Expedited services are offered for in office drop off or client portal upload. When you upload/drop off, please indicate that you would like it expediated. There will be a \$50 charge added to your return.

TIPS TO MAKE TAX PREPARATION RUN SMOOTH

- PLEASE VERIFY YOUR ADDRESS, EMAIL ADDRESS, AND BANKING INFORMATION.
- Open your mail. A **\$30** surcharge may be added if we have to open your mail.
- Take the paperwork out of envelopes, place in a neat pile with no staples.
- Do not bring in your medical receipts. YOU need those for your records. We need your totals in the organizer.
- Do not staple or tape your documents.
- Sign the engagement letter in TaxDome or physically.
- Complete the questionnaire in TaxDome or physically.
- To insure you get answers to your questions, please put questions in the notes section of your questionnaire.
- Your return will not be ready for pickup until we call you.
- Property tax refunds will be processed in August.

Appointment

- Please arrive at your scheduled time, check in at the front desk, and let us begin processing your paperwork. Diane or Christie will bring you into their office when they are ready.
- In Office Appointment - Due to high call volume please schedule online or call and leave a voicemail. There will be a *\$50 charge** added to your return.
- Zoom Meeting – Upload info to Tax Dome or drop off your info. When you upload/drop off, please indicate that you would like a zoom appointment. We will then call you to schedule the zoom. There will be a *\$50 charge** added to your return.
- If you drive from a distance of 45 miles or more, but don't need to sit with a preparer, give us a call. We have some options that could save you the appointment fee.

**Exceptions may apply, subject to client needs*

Also, if you have any questions please feel free to contact us at **320-656-9021**, email info@sartelltaxservice.com or message us in the TaxDome portal. We look forward to serving you.

Sincerely,

Diane St. Sauver

Diane St. Sauver
Certified Public Accountant

Christie L. Szabla

Christie L. Szabla
QuickBooks ProAdvisor