



No In house Interview System

In the last several years our office has been increasingly pressured for time during tax season to adequately prepare tax returns for all clients and we have found ourselves working 70, 80 and even 90 hours some weeks to get everything done, all at the expense of our personal health and family life. Additionally, we have found ourselves spending untold hours of time obtaining information in interviews only to find that we still need more information and cannot provide you with accurate tax estimates and tax planning ideas.

Each year has gotten more difficult, so we are going to try a change this year. Add to this the recent world-wide health concerns and we must make a change.

We are going to go to a tax return "goal date" system to replace the in-office interview. This system will give you a date by which we would like you to mail, drop-off or upload your tax information to us without setting aside your and our valuable personal time. By using the "goal date" system it provides you with a more definite time to get your information together without the pressure of an appointment. Then, within a few days after the "goal date" we will work on your return, determine if we need any further information, and call you with accurate amounts of refunds or balances due, actions that we can suggest to reduce this year's tax bill, and advice for next year. After our phone call we will be able to complete your return quickly and provide it to you with the advance knowledge you will have from our telephone call or zoom interview.

We believe this will be a much more useful and practical system for both of us while also providing us with some return to a normal life! And, thank you for helping us regain a little bit of sanity with this change.

This year we plan on preparing your return within a week and we would like you to plan on getting us your information using the organizer from my web site or call me to send you an organizer for special returns by your "goal date" of before _____. We believe this will allow us to prepare your return in a much more timely and productive manner.

Thank you

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