



ALERTS – PLEASE READ

- 1. Engagement Letter:** We must have the attached engagement letter signed and returned to our office prior to our beginning work on your 2019 taxes. It is important for us to notify you and it's your responsibility to read our firm's engagement letter and agree to the terms and conditions of the services we provide.
- 2. CPA Group Portal:** In our ongoing efforts to keep your data and identity safe and secure, the CPA Group of Laramie, LLC is in the process of implementing a new, even more secure, client portal system that will better allow us to receive and transfer information between yourself and our Firm. Please sign our Client Portal Terms of Use Agreement if you would like a portal setup. If you have any questions, please contact our office.
- 3. Paper Copy of Tax Return Opt-In Form:** Moving forward our standard form of tax return delivery is electronic via the client portal. However, if you would like a hard copy of your return we will gladly accommodate. Please sign the paper copy of tax return opt-in form.
- 4. Payment for Services:** **Payment for services is required when you pick up your tax return.** We reserve the right to ask for a retainer before beginning work and to not file your tax return electronically until payment for our services has been received. We make it easy for you to pay your bill online through our secure website at www.cpalaramie.com (click on "**Pay Fee**"). We also accept cash, checks and major credit cards.
- 5. Health Insurance Reporting:** In order to prepare your tax return, we **MUST** have all copies of any Form 1095-A, Form 1095-B and/or Form 1095-C related to health insurance coverage that you may have received from any issuer or agency. If you did not receive a Form 1095, we may have to ask you a number of additional questions about insurance coverage so that we can help you avoid penalties for failure to report any Advanced Premium Tax Credit received during the year.
- 6. E-File PIN Forms:** As licensed Certified Public Accountants, the Internal Revenue Service regulations prohibit us from electronically filing your tax return without a signed and completed PIN form. At the completion of your tax return, it is important that you return the signed PIN form to our office prior to us filing your 2019 tax return. We will make every effort to make it easy for you to provide us with your signed PIN form.
- 7. Identity Theft:** We can't emphasize enough how important it is for you to protect your identity. Combatting identity theft is currently the top initiative by the Internal Revenue Service. CPA firms nationwide have seen a large increase in the number of fraudulent tax returns being filed on behalf of their clients. At CPA Group of Laramie, LLC we take the issue very seriously and are working to combat identity theft by password protecting electronic communications with our clients. On engagements for new clients, we are requiring copies of a photo I.D. and social security card(s) or other proof of identity. Please visit www.cpalaramie.com and click on **Resources - Identity Theft Issues** for more information. ***We sincerely appreciate the opportunity to be of service to you.***