**Appointment Checklist and Instructions**

Thank you very much for your interest in working with our firm to service your tax preparation and accounting needs. As you may already know, we are conducting all appointments virtually this year. As such, we have outlined below how the process will work.

1. **Getting your documentation** – we will need you to provide your tax paperwork at least 3 days in advance of your scheduled time. This will allow us time to upload all your documents in our system and prepare us to be able to review the return with you at the time of our appointment. For further information that is needed, please review the following checklist (insert the Tax Appointment Checklist from our website). You can deliver your paperwork in one of three ways:
   1. **Electronically:** We will send you an invite to use our cloud-based program, Intuit Proconnect Link, which is through our accounting software.  This will be sent at the time your appointment is scheduled, or at the beginning of the new tax season (whichever is later). This will include a forms request feature, so that you are able to upload all your supporting documentation, as well as, answering questions that may apply to you during the year. You can also send documents via email; however, it is strongly recommended that they are encrypted, or password protected.  If you do not have this feature, we can send you an encrypted link to do so. We would also ask you to download our most up-to-date client organizer, which is attached to the email. Please send all documents and requests to dropoff@weiszaccounting.com.
   2. **Drop-Off:** You can drop your paperwork off at our office by using the mail slot located on the bottom left-hand part of the doorway.   There are signs on the doorway that give instructions as well. You can drop it off at any time and is not restricted to just our office hours. The mail slot is safe and secure. We would also ask you to download our most up-to-date client organizer, which is attached to this email. Please fill out and submit with the rest of your paperwork. Please ONLY submit copies to our office and NOT originals!
   3. **Mail In**: Please allow enough time for the postal service to deliver your paperwork to our office. In light of the Pandemic, the Postal Service has been taking about an extra week to get us our mail. We would also ask you to download our most up-to-date client organizer, which is attached to this email. Please fill out and submit with the rest of your paperwork. Please only submit copies to our office and NOT originals!
2. **Conducting the Appointment** – Based up your preferences, we can either conduct the meeting using the telephone, via Zoom conferencing, or Google Meets. Please let us know ahead of time if you haven’t already. Our team should have already gone over these options at the time of the appointment.
3. **Completion** – We have the option of sending you out your documents in one of the 3 ways:
   1. **Mail out –** Please allow 7 to 10 business days for receipt. We will send you out all the documentation with instructions. You can then sign the signature forms and mail everything back in the return envelope. You may also scan and email the signature forms to [authforms@weiszaccounting.com](mailto:authforms@weiszaccounting.com), or fax them to 215-462-7467.
   2. **Pick up –** We will call you when the returns are ready, and you can schedule a time to come to the office and get your documents.
   3. **Electronically –** We will email your copies of the return with instructions. Additionally, we will send you a request to sign the Electronic Filing Signature Forms via Right Signature. You will be able to do it safely and securely with your computer, smart phone, or tablet without the need of purchased software.
4. **Payment** – We accept personal checks, Cash and Money Orders, which can be dropped off or mailed to us. We also accept many forms of electronic payments, such as Venmo, Zelle, CashApp, Paypal (subject to a 3% processing fee), Credit and Debit Card (subject to a 3% processing fee) over the phone.

PLEASE BE ADVISED THAT WE WILL NOT FILE YOUR TAX RETURNS UNTIL WE HAVE RECEIVED BOTH SIGNED SIGNATURE FORMS AND PAYMENT!