MM Tax Service, Inc.
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2023 Tax Season Information

Please review this important information for the upcoming tax season and for best client practices to keep in mind when working with us to prepare your tax return.

Appointments: We urge you to mail, drop off or upload your tax documents and we will contact you with our questions. While some clients want us to make sure all their documents are in order and accounted for, we are not able to accurately tell you what is missing or if we will have questions for you before we start to work on your return. If you have questions or concerns about your tax return, please include specific questions and all new or unusual circumstances pertaining to 2023 when you submit your tax documents, and we will contact you when we start working on your tax return. We are focusing on preparing and completing tax returns during this busy time, therefore in-person meetings are very limited and are only available for new clients or for clients that have an usual circumstance that needs to be discussed before we work on your return. No appointments will be available after March 22, 2024 through April 15, 2024. Please also keep in mind that tax planning should be addressed throughout the year as opposed to during the busy tax season.

Submitting Tax Information/Documents: To the extent possible, please transmit or bring us your tax documents all at once rather than as you receive them. In most circumstances, we do not start working on your return until we have most of the information. We do realize that in some cases you might have one or several outstanding items that may not be available until later. If that is the case, simply get us what you have and let us know which items are outstanding and when you might expect to receive them.

- Secure Upload: Upload your documents securely by uploading them through the link on our website at mmtaxinc.com or through this direct link: https://www.encyro.com/mmtaxinc
- Mail: 1600 Shawano Ave, Suite 124, Green Bay, WI 54303
- Drop Off
  - No appointment needed but call ahead to be sure someone is at the office, or
  - Utilize the secure drop box or put your documents in an envelope and slide them under our locked office door (no one except staff have access to the office)
    - The building is usually locked each night at about 8:00 pm and on weekends.

Preparation Time: Tax returns are completed in the order that they are received and are normally completed in about 3 weeks after we receive all your information. However, the turnaround time will vary based on when all your information is received as there are other deadlines the office has during the tax season. If we have questions or need to contact you for additional documents, please know that it may take a few days for us to get back to your return after you get us the information. Please respond promptly to prevent delays.

Electronic Documents:

- Send electronic documents in PDF file format (rather than as photos taken from your phone)
- Do not send duplicates (if you send an electronic copy of a form, we do not need you to also send the paper copy)
- Try to submit all of your documents in the same format (receiving ½ of your information on paper and ½ electronically requires more time for us to organize everything)
- Send all pages of your brokerage/investment tax forms
- The fewer files the better! (it takes less time for us to organize your documents if you send us one PDF file with 5 different tax documents than it does to send us 5 separate files)

Review Returns: It is your responsibility to carefully review and approve your completed tax return before signing it. We will not electronically file your tax return without the proper signatures. Be sure to read the information we send you. We always provide you with filing instructions, payment instructions, refund, or tax due, a copy of your return and an invoice. If you have any questions about your completed tax return that are not answered in the information we send you, please do not hesitate to contact us, but please do so before you sign the authorization.

Fees: Our tax preparation fee does not cover additional services requested by you, such as tax planning, projections, responding to notices* and research. We base our fees off the time required to gather, organize, prepare and file your tax return, the difficulty of the forms involved, and any extra time spent collecting information from you. Also considered is the degree of skill required, time limitations imposed on us by others, the level of cooperation by the client and the value of the services to the client.

*We will review any notice that you receive for no charge, but we will charge additional fees for any correspondence or work that we may need to do because of a client or IRS error. If you receive a notice because of something we may have missed, you will not be charged for our work to correct the error.

Phone Calls, Messages, Emails: During tax season, emails and messages will be reviewed within 2-3 business days so we can assess the urgency of the message. Please keep in mind that we may not respond to your message until we are working on your tax return or when time is available. If your email/message contains information we need for your return, we may not respond if we do not have further questions.

A friendly reminder…please do not call the office while your tax returns are being prepared to check on the status. Responding to these requests takes valuable time away from the tax preparation process. We will contact you when your returns are complete or if we have questions. Please be patient and trust our process during this extremely busy time.