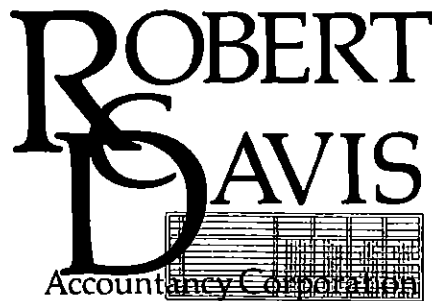


641 WOODS CREEK DRIVE, SUITE B
SONORA, CALIFORNIA 95370

TELEPHONE (209) 532-5548
FAX (209) 532-0148



11833 POWDERHOUSE ROAD
POST OFFICE BOX 803
GROVELAND, CALIFORNIA 95321

TELEPHONE (209) 962-7832
(209) 532-7877
FAX (209) 962-6544

Dear Client,

We are excited to welcome you as a new client of Robert C. Davis Accountancy! We appreciate the trust you've placed in us, and we look forward to working closely with you.

To ensure a smooth and seamless onboarding experience, we've outlined the next steps below. These will help us get started on the right foot and ensure we can deliver the best possible service to meet your needs:

1. Engagement Letter and Client Intake Form:

Every new tax season we release an engagement letter to be signed. This letter will contain information about due dates and new tax laws. Clients must sign a new engagement letter every tax season for our office to complete any tax services. Please fill out the new client intake form, sign the engagement letter, and return them to our office as soon as possible.

2. Prior tax return:

Our associates will need your previous year's tax return to get all information properly entered in our computer software. Please allow five (5) business days for this process.

3. Tax Organizer:

Once all your information is entered into our computer software, we can then send you a client organizer. The client organizer has a check list and tax information to help organize everything for the current tax season. These can be sent to you electronically or printed on paper.

4. Power of Attorney:

These Power of Attorney forms allow the Internal Revenue Service to communicate directly with our office on income tax issues. It also allows us to verify estimated tax payments and receive any letters or notifications on your behalf. The IRS Power of Attorney will need to be signed, while the FTB (Franchise Tax Board for CA) will send you a code in the mail to allow our office access. You can call our office or visit our website to enter the code before it expires. www.rdaviscpa.com

5. Download the App:

Our office uses Onvio. It is a user-friendly app that allows you to connect with your accountant and upload documents without ever having to leave your home! Download the Onvio app from the app store or follow the link on our website and our office can send you an invite!

We are here to make this process as easy and enjoyable as possible. If you have any questions at any stage, please don't hesitate to reach out to us.

Thank you,

Robert C. Davis CPA, Austin C. Davis EA & Staff