



AUSTIN C. DAVIS, EA

TAX PREPARATION, BOOKKEEPING & PAYROLL
641 Woods Creek Dr., Suite B. Sonoma, CA 95370 (209) 532-5548

Dear Future Client,

We are excited to welcome you to Austin C. Davis, EA! We appreciate the trust you have 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.

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, new tax laws, and any changes in our office. Clients sign engagement letters with our office every year before we can complete any tax services. Please fill out the client intake form, sign the engagement letter, and return to our office as soon as possible.

2. Prior Tax Return

In order to properly integrate your information into our computer system, our office will need a copy of your most recent tax return. Please allow five (5) business days to get this information fully processed.

3. Tax organizer

Before tax season our office will send out tax organizers to help our clients. These organizers will have a checklist and tax information to help you provide everything that is needed to complete your tax return. These can be sent to you by email or paper mail.

4. Power of Attorney

An active Power of Attorney (form 2848) allows our staff to communicate with the IRS on your behalf, pull past years transcripts, along with receiving letters and notices from the IRS on your behalf. For our California residents we will also provide a code for Tax Information Authorization from the Franchise Tax Board that will give us the same access. These codes can be called into our office or entered online using the link on our website.

5. Client Portal

Our office uses Onvio. This is a user-friendly website that allows you to connect directly with our office by uploading documents without having to leave your home! You can view and save past tax returns at the click of a button.

We are here to make this process as easy and enjoyable as possible. If you have any questions, please do not hesitate to reach out to us.

Thank you,

Austin C. Davis, EA