

## *New Year, New News!*

We are excited to announce the new ownership of Picket Fence Tax Service Inc.! David Bryant and Kimberly O'Donnell, who are very experienced in owning and managing another firm in the area, are thrilled about this opportunity that Kirk Kinder has entrusted them with!

We have some minor changes, but the people, dedication, and service remain the same! The office at 2012 Rock Spring Road and the phone number will remain the same. Michele, Sharon, Janis, Christine, and Audrey will still be familiar faces and voices! You may see a new face or two as we all work hard to keep providing great customer service.

Minor changes include our new client portal, which will hopefully be more streamlined and user friendly, along with a little tweak to our processes and office hours. We have also attached the client information worksheet, with a few additional questions, for you to fill out in advance. Please see below for more details.

### **Portal:**

- If you receive this newsletter as an email, you will soon be receiving an additional email from Intuit, inviting you to our new client portal. Please see the attached document labeled "Intuit Link Instructions for Clients" for further information and instructions.

### **Processes:**

- Client Information Worksheet
  - Please complete this worksheet prior to dropping off/uploading your documents to the portal.
  - For ease of access, the worksheet is attached to this email and is also available on our website. As always, a printed version will be available in our office.
- Methods of getting your tax documents to us...
  - Online Portal: Upload all documents as a PDF and **email us to let us know you're finished uploading**.
  - Drop Off: Stop by any time the office is open to drop your documents off to one of the admins.
  - Mail: This is the least secure option as there is a chance your documents may not make it to us. Please be sure to **include Suite A** in the address to ensure delivery to the correct office in our building.
  - We recommend that you **do NOT email any tax documents** as uploading them to our portal and dropping them off are the most secure options.
- Once your return is completed...
  - A staff member will call to notify you and go over the results. At that time, you can choose a pickup method (portal, in-office, mail). *Please note*, if you dropped off documents, you must come in to pick up the originals.
  - Signature pages can be completed by electronically signing or coming into the office and signing.
  - A PDF copy of your tax return, along with any accompanying documents, can be uploaded to your portal.
  - Your invoice can be emailed to you and paid for online.

We appreciate your continued support and trust in us during this transition. We are very dedicated to making this tax season great and look forward to working with you!

Sincerely,  
The Picket Fence Tax Team

2012 Rock Spring Road  
Suite A  
Forest Hill, MD 21050

	Monday & Wednesday		
	9 am - 8 pm		
Tax Season Hours:	Tuesday, Thursday & Friday	Off-Season	Monday &
<i>Jan. 27<sup>th</sup> – April 15<sup>th</sup></i>	9 am - 6 pm	Hours:	Wednesday
	Saturday		9 am - 5 pm
	9 am - 3 pm		