

Dear Prospective Client:

Thank you for contacting us. We welcome the opportunity to have you as a client. Below is our introductory letter, which explains our filing process. We ask all our clients, especially new clients, to fill in our client tax organizer and return it to us. A link to the organizer is available below, in the first step. Please save it to your computer, fill it in, and return it to us. If you have any questions, do not hesitate to contact us.

As a preferred provider of U.S. Expat tax planning and preparation around the world, rest assured you've made the right choice in selecting us to assist you. We know first-hand the difficulties you face working overseas and because your time is so limited, we've made the entire process as simple as possible without sacrificing attention to detail. Our Expat tax practice is designed to be convenient for you and/or your family and as stress free as possible.

Follow these convenient steps to engage our tax services -

- Open the client tax organizer at <http://palazzotax.com/forms/> and save to your computer. (we can email if preferred)
- Review, complete, and return the client tax organizer
- Sign and return engagement letter (attached)
- Email, fax or mail W-2s, 1099s, identification documents (driver's license, passport, social security card), and prior year tax returns (copies only). Please retain originals for your records.
- Go online to make payment or telephone in payment to 866-272-9224 – see [Pay Online at http://www.palazzotax.com/pay-online/](http://www.palazzotax.com/pay-online/)
- Once client tax organizer, supporting documents, signed engagement letter, and payment is received, we will prepare return
- We will ask questions and answer questions as needed
- We will send you a review copy via email
- Upon written authorization from you we will electronically file returns
- Keep in mind no action is taken without your permission
- Extensions will automatically be filed if return is not prepared by the filing deadline (Expats overseas on April 15th have until June 15th to file without penalty)
- Visit www.palazzotax.com to sign up for our monthly newsletter

Our experience and customer service is unmatched in the industry we serve. The annual Expat fee begins at \$500 and will cover your federal and one state tax return preparation, e-filing, and extensions. **See client tax organizer for additional fees.**

We must receive all information to prepare your return by March 15 to ensure that your return will be completed by April 15. If we have not received all of your information by March 15, and your return is not completed by April 15, you may be subject to late filing or late payment penalties.

It is your responsibility to inform us if you are required to file a locality, city, or school district tax return. These returns are not included with your standard tax preparation. We can assist you with preparing these returns for a nominal fee. Please let us know if you are required to file this type of return.

If you have any questions or need additional assistance please contact us. We look forward to serving as your Expat Tax Provider.