HHB Himmelwright | Huguley | Boles

Welcome to HHB!

Thank you for considering HHB for your accounting needs. We're committed to providing exceptional services to support your financial success. This overview outlines our processes. For additional resources, visit hhbfirm.com or contact us with any questions. We're happy to help!

Initial Client Meeting

1. When you first contact us, we will gather basic information and schedule a prospect meeting.
2. Before your meeting, you will need to provide your prior year tax return(s) to review.
3. During your meeting, we will:
   - evaluate your prior year tax return
   - discuss your financial situation, specific needs, and outline the scope of our services.
   - invite you to ask questions and provide any additional information.
   - fill out the "prospect client form", which we will use to evaluate next steps.
   - offer helpful checklists and resources to assist you with gathering documents.
   - if possible, provide an estimated quote for our services or outline our proposal process.
4. After your meeting, you will receive a follow-up with information about the next steps. In most cases, we will await approval from you to proceed with onboarding. For proposals, a timeline of that process will be provided to you.

Onboarding

After you have accepted your proposal or affirmed that you'd like to be a new client, we will request the information we need for onboarding. The list below serves as a general outline, but requirements will vary based on your specific case. **Please refer to direct correspondence from us to ensure an efficient onboarding process.**

- **Proposals:** relevant new client form(s) and related documents – corresponds to tax services
- **Individual:** PY tax return, driver's license(s), New Individual Client Form, NR Deposit
- **Business:** PY tax return, formation documents, New Business Client Form, NR Deposit

NR Deposit: New tax clients are asked to submit a $400 non-refundable deposit before we start work. This deposit will be applied as credit toward the relevant service, typically the current year's tax return, and covers:

- **Review of PY tax return –** we assess accuracy, opportunities, and needed tax documents
- **Create a tax organizer –** we will send this to you as an aid to gather your documents
- **Review of CY tax documents –** we ensure all needed documents are received for this year
- **Assessing potential tax savings –** we identify strategies to help reduce your tax liability
- **Filing Tax Extension –** if needed, we will file an extension for your current year return
- **Set up in our software & systems –** we establish your account within our secure system

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General Processes

1. **Document Collection:** Gather the requested documents and submit them to us as soon as possible to ensure timely preparation with ample opportunity to review information thoroughly. You can submit documents in these ways:
   - **Paper Documents:** drop off in-person at our Auburn or Opelika office during business hours
   - **SafeSend Exchange:** click the secure link in our email signatures to electronically send us documents – we will confirm receipt!
   - **SafeSend Organizers:** we can electronically send your tax organizer to upload documents and leave notes for your preparer (individual tax clients only)
     - **Note –** tax organizers can also be picked up in office for free or mailed certified for $25
2. **Preparation and Review:** Our team follows a multi-stage process to ensure your project is timely, accurate, and meets our quality standards. During this process, we may contact you if we need more information. We will also provide updates as possible to provide peace of mind.
3. **Contact for Delivery:** We will notify you of delivery using your preferred contact method.
4. **Delivery of Completed Project**: Delivery method will vary based on your service type and preferences. All relevant deliverables (e.g., IRS payment info, signature documents, K-1s) and IRS filing are included, regardless of delivery method.
   - **Electronic (SafeSend):** receive, e-sign, and download docs with a secure guided process
   - **Paper:** receive a hard copy and assisted document signing in-person at one of our offices
   - **Appointment:** To discuss your project before signing, we can schedule a call, virtual, or in-person meeting with a team member. Availability may be limited during peak tax season.
   - **Additional note for tax returns –** after e-filing, we will monitor and ensure acceptance. If any issues arise, we will contact you with the update and request additional information if needed.

Billing & Ongoing Support

We provide an estimated fee based on the initial scope of work and anticipated preparation time, which may be adjusted for unforeseen complexities. Final fees will be communicated promptly and transparently, according to your service type and engagement agreement. Payment options include check, ACH, recurring payments, or credit/debit card (online, via phone, or in person).

At HHB, we are dedicated to building a long-term relationship with you and want you to reach out anytime without hesitation. All our engagements include the added value of answering your questions, offering reassurance, and providing general guidance.

Please reach out anytime. We look forward to supporting your financial success!

Sincerely,

Himmelwright Huguley & Boles, LLC

Himmelwright, Huguley, & Boles