

KM&M is saving trees one tax return at a time!!

Please see the upcoming changes below:

We would like to introduce NetClient (our new client Portal):

1. In late December you will receive an email to set up NetClient .
 - a. NetClient will be used to transmit and store Individual and Business tax returns and related correspondence.
2. Individuals:
 - a. Also in late December, the tax organizer and tax engagement letter will be uploaded to personal Portals.
 - i. Both of these documents can be completed electronically and transmitted back through your Portal.
 - ii. Signed tax engagement letters must be received prior to tax preparation.
3. Businesses:
 - a. Tax engagement letters will be uploaded to your Portal.
 - i. These documents can be completed electronically and transmitted back through your Portal.
 - ii. Signed tax engagement letters must be received prior to tax preparation.
4. You will not receive paper "client copies" of your tax returns unless specifically requested. They will be readily available in your Portal.
5. There is a NetClient App available for your mobile device.
 - a. Review tax returns and sign documents directly from your mobile app.
 - b. Upload tax information through your mobile app.
6. The eMoney Vault will be disabled on June 30, 2018.
 - a. Please download any necessary tax returns before that date. If you would like assistance with this process, please contact our office at least thirty days prior to that date.

New invoicing process:

1. Individual tax clients that are not associated with a business may be receiving an invoice prior to the tax preparation process.
 - a. The invoice is due upon completion of your tax return.
 - b. The invoiced amount will represent a fixed fee arrangement based on our current knowledge of your tax circumstances.
 - i. If additional time is required to complete the tax return due to significant changes in your tax status, an estimate of the additional time to be incurred will be discussed and invoiced upon completion of your tax return(s).