

# Client Expectations

As we approach another busy season we at Lomness CPA Services Inc. are fully committed to providing you with exceptional accounting and tax services. Our goal is to ensure that your tax needs are met with the highest standard of professionalism, accuracy, and efficiency. To achieve this, we kindly request your cooperation in the following areas.

## Prioritize Communication

Even though we know taxes are not everyone's favorite topic, we ask that you make responsiveness to our team's request a priority. Should we request additional documents or information, please respond promptly with ALL requested items. We ask that you only reply once you have complied everything that we request. Please do not send requested documentation in multiple emails.

## Deadlines

Please review and abide by our deadlines. To ensure timely processing, returns are handled in the order we receive them. For early completion of your return, submit your documents as early as possible.

## Documents

We only accept documents in PDF, Microsoft Word, and Excel Formats. Do NOT send files in jpeg or heic formats, we will not be able to use those. If you are sending us documents, please do not send handwritten notes. For instructions on scanning documents into PDFs using an iPhone please [click here](#) to view a step-by-step video.

Only complete the tax organizer if you have all your tax documents. Please do not complete it if you have not received all your tax documents unless we are preparing an estimated amount for you to pay with your extension.

## Schedule C & E's

If you have a schedule C (small business) and do not have prepared financial statements, please [click here](#) to use our spreadsheet. To watch an instructional video on how to complete the spreadsheet please [click here](#).

If you have a schedule E (rental property) and do not have prepared financial statements or property management statements, please [click here](#) to use our spreadsheet. To watch an instructional video on how to complete the spreadsheet please [click here](#). If you have any additional expenses not reflected on your property management statements, please complete the spreadsheet and include ONLY the additional expenses.

If you do not use our spreadsheet or do not have prepared financial statements, you may be charged an additional fee for us to prepared it for you.

## Treat Staff with Respect & Courtesy

We firmly believe we have the best team in the business. We ask that all of your communication with our staff be gracious and respectful. If a client demonstrated they are consistently unable or unwilling to abide by these

expectations, we may choose to reevaluate our engagement.