Welcome to Master Plan Tax

On behalf of our team, I'd like to personally welcome you to our Master Plan family. Thank you for entrusting us to help you use your finances as a tool to live a flourishing life.

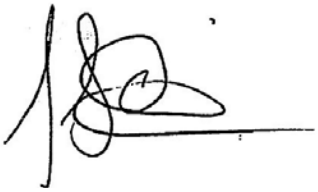
We are looking forward to working with you in the months and years ahead. As your new financial partner, our goal is to free up your time so you can focus on what matters most to you.

The first step in beginning our work together is your completion and review of details in this packet.

Here's what you may find enclosed:

1. **Our Tax Process** [A step-by-step guide of what to expect in working together]
2. **Our Team** [Here's who you may be interacting with]
3. **Information Collecting** [Here are some items we may be asking for]
4. **Tax Filing Service Agreement** [Officially hiring us.]
5. **Privacy Policy** [How we respect the privacy of your information]
6. **Additional Services** [In addition to personal tax prep, these are our additional service offerings]

Happy Flourishing,



Jeremy Andries *CFP®, EA, MSA*
Partner | Managing Member
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The MPTS Tax Process

Our goal is to unburden you in the tax preparation process. To do so, we want you to know, ***step-by-step***, what to expect in preparing your tax return. A new addition to the process this year is **text message status updates** on your tax return.

1

You'll receive access to your Tax Portal. When you log into the portal you can sign your tax agreement under the Files tab.

2

In your portal, under the Surveys tab, you will need to fill out the Tax Organizer. At the end of this survey you will upload your tax documents (You can also add your tax files later).

3

Once you have submitted the tax organizer and your supporting tax documents, we will review information and begin preparing your return.

4

You'll likely hear from one of our team members with questions about your tax situation or requesting additional information.

5

After confirming all your information, we will finalize your return and place a copy of it in your tax portal. You'll need to review your return and sign it. If you are filing a joint tax return, you and your spouse will both need to sign in under your separate email addresses to sign the return.

6

After eSigning your tax return, we will add your invoice into your portal where you will be able to pay online. Subsequently, we will electronically file your return.

If you prefer not to use our online portal you can email or call us about our process to do so. We can schedule an in-person appointment or pick-up appointment; or you can drop-off at our office.

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MASTER PLAN TAX SERVICES

Our Team

Throughout the tax season you may be interacting with a few different members of our team. We'd like to introduce them here, and let you know when you're likely to hear from them.

Jeremy Andries *CFP®, EA, MSA*
Partner | Lead Tax Advisor
jeremy@masterplantaxes.com

Jeremy is an experienced tax advisor and the Founder of Master Plan Tax Services. You may interact with Jeremy as he helps review and prepare tax returns.

Teresa Hill
Office Assistant
teresa@masterplantaxes.com

Teresa is the office assistant at Master Plan and has experience working with business owners on the bookkeeping side of the business. You'll likely hear from Teresa at the onset and conclusion of the tax season.

Christopher Wells, *CFP®, CKA®, MS*
Partner | Financial Planner
chris@masterplantaxes.com

Chris leads the financial planning and investment management services through our firm Flourish Financial Planning. You may interact with him if you have investment or financial planning questions that relate to your tax strategies.

Sudha Chinthamreddy
Tax Specialist
sudah@masterplantaxes.com

Sudha is a tax consultant with over 5 yrs of experience in the tax preparation industry. She is originally from India and holds a Master's degree in Mathematics. Sudha may have questions for you as our team is preparing your return.

Michael Lawrence
Tax Specialist
michael@masterplantaxes.com

With his BBA in accounting from UNT, Michael serves as a tax consultant helping to prepare your returns. As our team has questions or needs clarity in your tax situation you may be hearing from Michael.

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Information Collection

To make the data gathering process a little easier for you, we use an Online Tax Portal. In your tax portal, you will be able to go through a survey to let us know general information about your tax situation, and you can upload digital copies of your tax documentation. Additionally, you'll be able to sign documents and pay invoices in the online portal. Here are some general items to gather to add to the tax portal.

General Documents

- Driver's Licenses (Required to eFile)
- A prior year's tax return (If we do not have one already)
- Estimated Tax Payments

Income Documents

- W-2s
- 1099s
- K-1s
- Rental Income and Expenses
- Self-employed Income and Expenses
- Unemployment Income (1099-G)

Business Documents

- Profit and Loss Statement (if available)
- Balance Sheet - Year End (if available)
- 1099-NEC or 1099-MISC
- If an LLC, State Webfile Number (XT number)

Deduction Items

- Charitable Contributions
- Taxes Paid
- Mortgage 1098
- Medical Expenses
- IRA, ROTH IRA, or HSA Contributions
- Education Expenses

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Additional Services

Our services are not limited to personal and business tax preparation. We would like to be your one-stop-shop for your personal financial services. Here are some of the additional services we provide.

Fee-only Investment Management

Flourish Financial Planning is our fee-only investment advisory firm. Fee-only means we do not have any products to sell nor do we get a commission for specific recommendations. Our tax-focused investment management services integrate your entire financial situation to best reach your goals. Email Chris for a complimentary meeting chris@flourish-fp.com.

Bookkeeping

Any good business needs to keep good records. Bookkeeping can help assess the health of your business, organize income and expenses for tax preparation, and handle payroll for employees. Contact info@masterplantaxes.com for additional information.

Tax Advisory Plan

With our monthly Tax Advisory Plan subscription you get two (2) two-hour planning/advisory meetings and quarterly one-hour phone/video calls planning sessions per year, in addition to the tax preparation and filing. This service is paid monthly and includes your annual tax prep fee. Contact jeremy@masterplantaxes.com for pricing and additional information.

Comprehensive Financial Planning

As an independent, fee-only firm, we provide on-going or one-time financial plans to comprehensively cover all areas of your financial life. Advice covering: retirement, taxes, insurance, budgeting, debt management, and investments. Email Chris for a complimentary meeting chris@flourish-fp.com.

IRS Representation

If you have received a notice from the IRS (being audited or other) we can go before the IRS on your behalf. We also can assist in unpaid back taxes, offer-in-compromises, or tax levy assistance. Contact jeremy@masterplantaxes.com for additional information.