



FRASER, WALDROP & COMPANY CPA'S INC

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The CPA. Never underestimate the Value.

IRS regulations have dictated that CPA firms take significant precautions to safeguard your personal information. In order to comply with these regulations for the 2024 tax filing season and going forward, we will be setting up a secure Portal for all our clients that will allow both of us to share information within a secure and protected environment that meets the standards required by the IRS.

Many of you should have already received an e-mail from us to set up your Fraser, Waldrop & Company Portal. It is very important you use a strong password that you can remember to set up your Portal. Don't worry though; if you forget your password, the system has built in mechanisms to reset your password if necessary! Just click "forgot password" and the system will help you to restore your log-in.

In order to keep your private information secure, your Portal should be your first choice to both send and receive documents with Fraser, Waldrop & Company. We have invested significant resources to ensure your personal information remains secure and out of the hands of people who would like to steal your identity. Please call our office immediately if you have any questions or problems setting up or using your Portal.

When your Portal has been set-up, the first document you will receive from us for the 2024 tax filing season is a copy of your organizer. Many of you should have already received that. We encourage you to print it out/ review it immediately to help gather your documentation for the upcoming tax filing season. **If you cannot work with the Portal system, it is important that you call our office ASAP to receive a paper copy of your organizer- at no additional charge.**

Please note, files sent through your Portal will expire after 5 years. For example, your 2024 tax returns (prepared in 2025) will be available to you through 2030. We strongly encourage you to make your own electronic copy (perhaps onto a thumb/jump drive) of your tax returns as soon as they become available in your Portal- as it should not be considered a permanent storage location.

Due to both the significant software investment we have had to make to set-up these secure Portals, and the ever-increasing costs to produce and securely mail the bound copies, there will be an additional \$25 charge if you request the paper version of your tax returns. Again, we strongly encourage you save all Portal documents, perhaps onto a thumb/jump drive. It is cheaper, faster and most importantly, far more secure from identity theft than sending paper copies of your tax return through the US Mail.

We want to work with you in the way you would prefer. Please indicate by marking the appropriate boxes below as to how you would like to receive your organizer, tax returns, and original documents. We will note it in our files and continue to deliver our services in the way you indicate until you notify us otherwise.

Please pick one of the two below:

- I would like to receive a paper copy of my organizer.
- Please deliver my organizer through my Portal. No paper copy is needed.

Please pick one of the two below:

- I would like a paper copy of my tax returns, and I agree to pay the additional \$25 charge.
- Please deliver a copy of my tax returns through the Portal for free.

Please pick one of the two below:

- Please return all original documents.
- Please securely shred all original documents after you have posted scans of them to my Portal.

We recognize that the above represents a significant change in how some of you have worked with us in the past. We want to make this transition as painless as possible so we encourage your feedback. Remember that our goal is to provide you with professional services that are provided in a way that is faster, cheaper, safer and more environmentally responsible than we have in the past. Please sign below to indicate approval of your choices checked above, and return this letter with your signed engagement letter and your signed choice of Audit Protection Plan.

Thank you,
Fraser, Waldrop & Company CPA's Inc.

Tax Payer Signature

Spouse Signature

Printed Name

Printed Name

Date

Date