

# egggsacttax, inc.

*Along with NestEggg, make putting all your “Egggs” into one basket, SAFE, SOUND & SECURE!*

Hello,

We'll, it's that time again! Time to get ready to file for 2018 tax filings, as the IRS has released that we can begin tax preparation on 1/28/2019. The deadline for “most” businesses is March 15, 2019 and personal April 17, 2018. If we are to prepare your taxes for you, we request that all requested data must be submitted to us by February 15, 2019 for business filings and March 15, 2019 for us to process your personal returns timely. If you are unable to fulfill the request(s) above and require an extension, please advise us in writing (preferably email) by the same dates above (confirmation that it was received is necessary and understand that if this is not received by our offices, we are not responsible for any of your penalties, interests or damages, you may incur).

For EgggsActTax, Inc. to successfully and accurately prepare your 2018 Taxes, EgggsActTax will need for you to print out the attached engagement letter and gather all necessary tax documents (pursuant to the checklists provided) so that we can accurately begin the work. We will require this year, prior to any work beginning, completed and signed copies of the engagement letter (one signature for single and businesses and both for married). To accurately prepare you tax returns we MUST have this data along with any accounting records you have for you or your business, if The NestEggg Group, Inc, doesn't provide your accounting services. If QuickBooks, we will need your approved and signed off on 2018 Profit and Loss statement (either cash or accrual, depending on your business structure) and Balance Sheet, in addition to the signed engagement letter and checklist with all requested tax data.

**Without this data, we cannot file your taxes.** If your data is incomplete (missing data, such as income or expenses paid or received by you as an individual) it is your responsibility to get this to us, so we can efficiently provide you the best service possible.

If you work with another Tax professional and will not use the tax services of EgggsAct Tax, Inc. and wish to have The NestEggg Group, Inc., supply data to a 3<sup>rd</sup> party, you must send that firm/professional an email and copy [jeff@egggsacttax.com](mailto:jeff@egggsacttax.com) on your request. Upon receipt, we will send directly to you and your tax professional the requested data (only after we have received the signed copies of your yearend financials from you) that we do keep on file for up to 7 years, even if we don't provide the tax service(s). It will be your responsibility as the tax payer to confirm that all data submitted by/or to a 3<sup>rd</sup> party, is in fact accurate and true, without this we will unable to process your request(s).

Ultimately it is our job to report to the government the data you have supplied to us and will not be held accountable for incorrect or missing data from you.

320 North Palm Canyon Dr. Palm Springs CA 92262

Phone: 888-987-NEST

Fax: 866-902-0435

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We require that anything you send to us be sent with a signature read receipt and "high" priority, this helps us to ensure that your documentation has been received. If you can't do this, we request that you follow up with an email daily requesting confirmation of receipt. If you are unable to email, you may fax to 866-902-0435 or mail via the USPS, but still require that you follow up with us to confirm receipt.

For individual tax return(s), Forms: 1040, 1040EZ or 1040NR, we will require per the IRS and applicable state that we have verified you via your Legal "Proof of Identity, either a Driver License, State issued I.D or U.S Passport. Please submit this to us when you send tax related required documents.

These tasks may seem a bit demanding but is vital to our successful filing and assistance with your taxes and potential tax liability.

We appreciate the ability to offer the services of EgggsAct Tax Inc and look forward to working with you.

**To "Get the Eggg Rolling" simply email [jeff@nesteggg.com](mailto:jeff@nesteggg.com) to request your copy of either our business and/or personal tax checklist(s). Upon receipt of your email, I will send you the checklist(s) with any questions specific to your needs, so that your tax experience meets your needs. I look forward to working with you!**

Respectfully,



Robert Jeffrey Wolter, President  
EgggsAct Tax, Inc.

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