



Dear Valued Client:

We sincerely hope you and your family are doing well and staying safe. The Covid-19 pandemic is a serious threat to our safety and long term good health. Our goal is to provide you with the best possible service while doing what we can to protect you. For your safety we have employed technology to minimize your need to come to our office. To update your information in our database we have upgraded our website.

If you do not have access to the internet or have questions, just give us a call. Otherwise, please go to our website www.taxesconway.com to perform the following procedure.

Registration: (*menu option- start here*)

Step 1. **Covid-19 Procedure**

What we do after we receive your documents.

Step 2. **Terms of Engagement - As Soon As Possible.**

Read. You can print a copy for you records.

Sign by typing your name and click the **Submit** button

Step 3. **Client Information - As Soon As Possible.**

Select your filing status then complete the Client Information Form.

You can print a copy for your records.

Click the **Submit** button to email the form to us.

By submitting you agree to our terms of engagement.

Step 4. **Tax Documents – When you are ready**

Choose 1 of the 5 options to provide your data to us.

1. Use our secure portal to upload your tax documents.

We highly recommend this safe and secure option.

- a. Your documents are store on the portal for 7 years.
- b. You have 24/7 access to your portal.

*To learn how to create your portal account select the **Portal** menu option. It's quick and easy.*

2. Fax your documents to 502-515-2457

3. Email your documents to client.info@taxesconway.com
4. Mail your documents to
PO Box 50931 Myrtle Beach, SC 29579
5. Drop them off at our office during normal business hours.

We will contact you after we receive your documents.

Step 5. **Documents reviewed**

After receipt, we will review them and then give you a call.
We can also initiate a ZOOM meeting to discuss your tax documents if necessary.
Set a date to complete your return.

Step 6. **Completed tax return**

We will give you a call to discuss your return.
We can also initiate a ZOOM meeting to discuss your tax return if necessary.

Step 7. **Payment**

Once you are satisfied you have 3 options to submit payment
Mail a check
Send payment using Zelle at 9041040@gmail.com.
Provide us with your credit card info - *we DO NOT store it.*

Step 8. **Submit return to IRS and State**

After payment is received.