

WELCOME TO TAX SEASON 2026

We're excited to be working with you this year! This guide provides an overview of our process at American Expat Tax Services (AET).

Step 1- Initial Setup with the Administrative Team

At this point you've already worked with our Admin team to sign your engagement letter, make your deposit, and set up your client portal. You can reach out to our Admin team for any non-tax-related questions, such as invoices or general inquiries about your engagement, at admin@amexpattax.com

Step 2- Information and Document Collection with the Client Service Team

Next, you will work with our Client Service Team (CSR) to gather most of the information and documents needed to begin preparing your file. The CSR team will contact you on a weekly basis until all requested documents and information are received. You can reach the CSR team at csr@amexpattax.com.

Step 3- Working with your International Tax Specialist

Once we have all the necessary documents, your CSR team member will transfer your file to your International Tax Specialist. You can expect an introductory email from them within a week.

Due to the specialized nature of international tax preparation, we might ask for more documentation than you're accustomed to. We understand this can be frustrating, but thoroughness is crucial for the best outcome. Providing the requested items promptly will help us complete your engagement more quickly. Your Tax Specialist will start with your return(s).

After preparing your return(s), your Tax Specialist will send you a draft for review. Once you've approved the draft, your Tax Specialist will send a final invoice for our services.

Step 4- Signing/Mailing your Return(s) with the CSR

Once we receive your final payment, your return(s) will enter our delivery queue with the CSR Team. All returns are sent for signing via AssureSign software, regardless of the filing method (e-file or mailing). You will receive "Delivery Instructions" with information on where to mail your returns if necessary. For assistance during the delivery/signing process, reply to your delivery email or contact CSR directly at csr@amexpattax.com



AMERICANEXPAT
TAX SERVICES

WHO TO CONTACT WITH QUESTIONS

WHAT DO YOU NEED?	WHO & HOW TO CONTACT
• Appointment scheduling • Billing matters • AET client portal support • Updating information on file (e.g., phone number, address, email) • Proposal assistance in Practice Ignition	Concierge admin@amexpattax.com 1-888-243-9992 Monday-Friday 9:00am-5:00pm CST
• Providing a list of requested information/documents • Updates on initial information needed to start your return • Uploading documents to client portal/ShareSafe • Viewing/downloading tax returns/documents • Finding passwords for return/document signing • Signing returns/documents	Client Service Team (CSR) CSR@amexpattax.com
• Tax questions • Tax advice • Tax strategy • Questions about your invoice • File status updates	Assigned International Tax Professional (You will be provided with your tax professionals contact information upon being handed off.)