WELCOME TO AMERICAN EXPAT TAX SERVICES

Hello and welcome to Tax Season 2023!

We're so glad to be working with you this year. As part of your process we like to make sure our clients understand how things move here and that you know who to reach out to if you have any questions.

You'll be working with 3 teams here at American Expat Tax Services: The Concierges, The CSR (Client Service) Team, and your Tax Specialist.

Step 1- Initial setup with the Concierges

You've already been working with our Concierges as they helped you sign your Engagement letter (Proposal), make your deposit, and set up your portal. You can reach them at info@amexpattax.com with any non-tax related questions including payment related or general questions.

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

Our Customer Services (CSR) Team will be contacting you once a signed engagement and deposit are received to assist you with gathering and uploading the information/documents needed to complete your engagement with us. They can be reached at csr@amexpattax.com if you require assistance sharing your information.

Step 3- Working with your Tax Specialist

Once we have received your required tax slips and documents, your CSR Team member will transfer your file to your Tax Specialist who will reach out to you via e-mail to introduce themselves. Your Tax Specialist will start work on your tax returns and may reach out with further questions or request additional documentation. The more quickly you provide required items, the more quickly we will be able to complete your engagement with us.

We may need a lot of information!

Please bear in mind that because of the specialized nature of International Tax Law that we may ask you for more documentation than you're used to providing and this may be frustrating. The specialized nature of International Tax and our dedication to give you the best possible outcome both now and in the years to come means that we need to get the best view of your unique situation. We want to make sure we explore all options available to you and no two clients are the same.

When your return(s) have been prepared and are ready for your review, your Tax Specialist will send you a copy of your return(s) as well as your final invoice.

Step 4- Signing/Mailing your Return(s) with the Client Service Team

Once you approve the tax return and your final payment has been received, the CSR team will deliver your returns to you for your signature (efile eligible returns) and/or mailing (not eligible for efile). They can be reached at csr@amexpattax.com if you require assistance.