WELCOME TO TAX SEASON 2024 WITH AMERICAN EXPAT TAX SERVICES

We're so glad to be working with you this year! We have created this guide to give our clients an overview of our process here at American Expat Tax Services, throughout which you will be working with our Concierge, our Client Service Team (CSR), and a Tax Specialist. Read on for a more in-depth explanation of how each step works and with whom you will be working.

Step 1- Initial Setup with the Concierge

At this point you've already worked with our Concierge as they helped you sign your engagement letter, make your deposit, and set up your client portal. If you have any non-tax related questions including payment or general inquiries about your engagement, you can reach them at admin@amexpattax.com

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

Next you will start working with our Customer Service Team, often referred to as CSR. They will provide you with a list of information/documents needed to begin preparation of your file. The CSR team will be in contact with you on a weekly basis until all the requested documents/information have been received. Our CSR team can be reached at csr@amexpattax.com.

Step 3- Working with your Tax Specialist

Once we have received all the required information/documents, your CSR Team member will transfer your file to your Tax Specialist. You can expect to receive an introductory email from them within a week of being transferred. Your Tax Specialist will start working on your return(s) and may reach out with further questions or request additional documentation. **We may need a lot of information!**

Please keep in mind that due to the specialized nature of International Tax preparation we may ask for more documentation than you're used to providing. We understand this can be frustrating and are dedicated to giving you the best possible outcome both now and in the years to come, which means that we need to be thorough and explore all options available to you. Be advised that the more quickly you supply the required items, the more quickly we will be able to complete your engagement.

Once your Tax Specialist has prepared your return(s), they will provide you with a draft copy for your review. We ask all our clients to take time to review their drafts and let us know if there are any errors, comments, questions, or concerns. Once you approve your drafts your Tax Specialist will send you a final invoice for our services.

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

Once your final payment has been received by our Concierge, your return(s) will go into our delivery queue. All of our returns are sent for signing via Assuresign, regardless of the filing method (e-file/mailing). Later in the process, you will receive "Delivery Instructions", where you can find additional information such as where to mail your returns if they need to be mailed. If at any point in the delivery/signing process you need assistance, please use "reply all" in your delivery email or contact CSR directly at csr@amexpattax.com

WHO TO CONTACT WITH QUESTIONS

WHAT DO YOU NEED?	WHO & HOW TO CONTACT
Assistance with appointment scheduling. Assistance with billing matters. Assistance with AET client portal. Assistance with general non-tax questions. Assistance with updating information on file (phone number, address, email address, etc.). Assistance with your proposal in practice ignition.	**Concierge** admin@amexpattax.com 1-888-243-9992 Monday-Friday 9:00am-5:00pm CST
Assistance finding password for return(s)/document signing. Assistance uploading documents to client portal/ShareSafe. Assistance viewing/downloading tax return(s)/documents. Assistance with signing return(s)/documents. Provides a list of information/documents being requested. Updates on initial information needed to begin your return(s).	**Client Service Team (CSR)** CSR@amexpattax.com
All tax questions. Questions about your invoice. Tax advice. Tax Strategy Update on file status.	**Assigned Cross Border Tax Professional** (You will be provided with your tax professionals contact information upon being handed off.)