



## WELCOME TO TAX SEASON 2025

We're excited to be working with you this year! This guide provides an overview of our process at American Expat Tax Services. Throughout the process, you will collaborate with our Concierge, Client Service Team (CSR), and an International Tax Specialist. Continue reading for a detailed explanation of each step and the team members you'll be working with.

### Step 1- Initial Setup with the Concierge

You've already worked with our Concierge to sign your engagement letter, make your deposit, and set up your client portal. For any non-tax-related questions, including payment or general inquiries about your engagement, contact them at [admin@amexpattax.com](mailto:admin@amexpattax.com)

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

Next, you will work with our Client Service Team (CSR). They will provide a list of the information, and documents needed to begin preparing your file. The CSR team will contact you weekly until all requested documents and information are received. You can reach them at [csr@amexpattax.com](mailto: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. Your Tax Specialist will start on your return(s) and may request additional information.

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.

After preparing your return(s), your Tax Specialist will send you a draft for review. Please review it carefully and provide feedback on any errors, comments, questions, or concerns. Once you approve 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. All returns are sent for signing via AssureSign, 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](mailto:csr@amexpattax.com)



## WHO TO CONTACT WITH QUESTIONS

WHAT DO YOU NEED?	WHO & HOW TO CONTACT
<ul style="list-style-type: none"><li>• Appointment scheduling</li><li>• Billing matters</li><li>• AET client portal support</li><li>• Updating information on file (e.g., phone number, address, email)</li><li>• Proposal assistance in Practice Ignition</li></ul>	<p><b>Concierge</b> <a href="mailto:admin@amexpattax.com">admin@amexpattax.com</a> 1-888-243-9992 Monday-Friday 9:00am-5:00pm CST</p>
<ul style="list-style-type: none"><li>• Providing a list of requested information/documents</li><li>• Updates on initial information needed to start your return</li><li>• Uploading documents to client portal/ShareSafe</li><li>• Viewing/downloading tax returns/documents</li><li>• Finding passwords for return/document signing</li><li>• Signing returns/documents</li></ul>	<p><b>Client Service Team (CSR)</b> <a href="mailto:CSR@amexpattax.com">CSR@amexpattax.com</a></p>
<ul style="list-style-type: none"><li>• Tax questions</li><li>• Tax advice</li><li>• Tax strategy</li><li>• Questions about your invoice</li><li>• File status updates</li></ul>	<p><b>Assigned International Tax Professional</b> (You will be provided with your tax professionals contact information upon being handed off. )</p>