JOHNSON MIZELLE, STRAUB & CONSOLVO, LLP
CERTIFIED PUBLIC ACCOUNTANTS

Client Policies

We have implemented the following policies to ensure efficient and accurate service. Please review, acknowledge, and confirm your understanding and acceptance of this agreement by signing your engagement letter.

1. **Busy Season Communication (Jan–Apr 15)**
   Due to the high volume of work during tax season, we kindly request that you refrain from calling or emailing **to inquire about the status of your return**. Our staff is working diligently, and we will reach out if additional information is needed or to discuss any matters related to your return. Contacting us during this busy time can delay the preparation of your tax return and increase your costs.
2. **Document Submission**
   Submit your **complete set of tax documents in bulk** as early as possible after receiving **all** forms. Sending documents piecemeal slows down the process and increases the chance of errors or delays; therefore, it is preferable to use the Canopy portal.
3. **Tax Organizer Completion**
   Carefully read and respond to **all questions** from our tax organizer. Provide all requested documents and explanations where applicable. Incomplete responses may delay your return.
4. **Extensions and Payments**
   If your return requires an extension, we will make every effort to inform you whether a payment should be submitted with your extension filing. Please anticipate email communication as well as Canopy notification.
5. **Estimated Tax Payments**
   Clients are responsible for paying estimated taxes when required. We are happy to assist with planning, but timely payment is your responsibility.
6. **Payments to Government Agencies**
   For security reasons, we strongly encourage online payments; we no longer accept client checks for mailing federal or state payments.
7. **Copies of Tax Returns**
   We will provide you with a digital copy of your tax return free of charge. Paper copies will incur a $25.00 charge. A permanent copy of your return will be stored in your portal for 7 years and will be accessible at any time.
8. **Year-Round Communication**
   Please contact us throughout the year to report any financial or life changes that may affect your tax situation (e.g., job changes, marriage, property transactions).