

DENISE STUBBS, CPA

Working With Us: A Quick Guide

Welcome! We're a fully remote, paperless CPA firm, which means your experience with us looks a little different from a traditional accounting office. We built our practice around the belief that geography shouldn't limit the quality of your service, and that the right systems can make working with a CPA firm faster, more secure, and more responsive than the traditional model ever was. This guide walks through how we communicate, how documents move between us, how meetings work, and how we protect your information, so you know exactly what to expect from day one.

We're Remote by Design

We don't have a client-facing office, and we're not trying to be near you geographically. Every document, signature, and conversation happens securely online, which lets us respond faster and keep your records safer than a filing cabinet ever could.

What We Believe

A few commitments shape every part of how we work with you:

- **Speed is a form of respect:** we move quickly and treat your time and money as always being at stake.
- **We do what we say:** if we say we'll do something, we do it. If something changes, you hear from us before the deadline, not after.
- **Your outcome comes first:** we're here to give you real advice, including the advice that's hard to hear, not just to take orders.
- **We own our mistakes:** when something goes wrong, our first move is to own it and fix it, not to explain it away.

Getting Started

We start by setting you up in TaxDome, our secure client portal. Your engagement letter, which spells out the scope of the work, the fee, deliverables, and each party's responsibilities, is signed right there in your portal, so from day one there's a single, secure place where everything lives. Once it's signed, we'll request the documents we need to get started, with clear requests through the portal describing exactly what's needed.

How to Reach Us

- Messages and updates flow through your secure TaxDome portal, which syncs with email, so you can reach us from your own inbox and nothing gets lost. Documents specifically should go through your portal, so your sensitive information stays protected.
- You'll hear back within 24 business hours, always, even if it's just to confirm we're on it and let you know when to expect a full answer.
- Need to talk it through? We're glad to hop on a phone call; just let us know.
- Please don't send tax or financial documents by regular email. Upload them to your portal instead, since it's encrypted and it's the safer way.

How Documents Move

- Everything is exchanged through your TaxDome portal: source documents, signed engagement letters, e-signatures, and your finished return or report.
- We're paperless by design. We don't print, mail, or hand-deliver documents as a standard practice, so you'll always have a digital copy in your portal.
- Please keep your own copies of anything important. Your portal is how we exchange documents, not a substitute for your own records.
- Have something physical to drop off? Our secure drop box makes it easy, we'll scan it and get it into your file. A scanning fee applies.

Meetings Are Virtual, By Default

We meet with clients by video call or phone rather than in person. It lets us give you our full attention, share screens, and keep a record of what we discussed, without anyone needing to drive anywhere. If a particular situation genuinely calls for something different, just ask and we'll talk it through with you.

A Note on Tax Advice

There's an important difference between general, educational information and a formal, written tax opinion on your specific situation. If your question calls for the latter, we'll let you know and talk through what that engagement looks like. Either way, you'll always get a clear, direct answer, never silence or a runaround.

Your Privacy Matters

- Every device we use is encrypted, every network connection is secured, and every conversation involving your information happens somewhere private.
- Your information is never used for anything beyond the work you've engaged us to do.

Questions?

Reach out anytime through your TaxDome portal, or call us at (828) 570-5760.