

December 17, 2007

Issue 2007-27

ExacNews

Exactax Client:

Tax season is almost here and Congress has still not passed important 2007 legislation needed to prevent a large tax increase in the alternative minimum tax. The IRS has told Congress several times that late legislation will delay the processing of refunds, possibly until mid-February. We do not see this impacting the printing of proforma at this time but we will keep you informed.

Automatic Features and Preparer Information Forms

The *2007 Automatic Features and Preparer Information* forms were included with the previous ExacNews, Issue 2007-26. If you have not already done so, review the contents and, **only if you have changes**, return the forms as soon as possible. If the forms are not returned, your current Automatic Features will rollover to the 2007 tax system.

Tax Organizers

All Tax Organizer orders received by November 29th have been shipped. Orders received after November 29th will be printed and shipped on a weekly basis. Late returns that were not on the Tax Organizer Order Form must be individually requested by contacting Customer Support. Orders for pre-printed Organizers will not be accepted after December 31st. Blank Tax Organizers may be ordered at any time. The minimum order for blank sets is 5.

Holiday Cards and Tax Newsletters

All orders for holiday card/calendars and tax newsletters have been shipped.

Workshops

The 2008 schedule of workshops and registration form were included with the October 16th *ExacNews, Issue 2007-23*. Confirmation/Admission cards have been mailed out for all registrants as of November 30th and will continue to be mailed out on a daily basis. If you did not receive the bulletin, need to renew for tax year 2007 or register for a workshop, contact our Customer Support Department at (800) 254-2244.

Annual Renewal and Current Account Status Required

Tax Organizers, Proforma, Starter Kits and software will only be available to accounts that have renewed for the 2007 tax filing season and do not have a current COD balance. If you have not renewed your account and need assistance, please contact our Customer Support Department to complete the renewal process. Please allow a minimum of two weeks from your renewal date or from clearing COD status to receive any of the items listed above.

Proforma

Individual: Proforma for the 1040 system is scheduled to begin printing and shipping the last week of December. Proforma will be provided for all returns processed through December 17th*. The initial 1040 proforma will contain federal, California and all other states that are available. Proforma for returns processed between December 17th and December 31st, 2007 will be shipped in early January. Proforma for returns that contain states not available for the initial shipment will be shipped as the state proforma becomes available.

Fiduciary and Business: To provide input forms as early as possible, the initial Fiduciary and Business proforma will ship with federal forms and any states that are available. Shipping is scheduled to begin in early January. Proforma for other fiduciary and business

state forms will be shipped as soon as they become available.

***Note:** To receive proforma for 2004, 2005 or 2006 1040 returns processed after December 31st, contact the Customer Support Department to order the proforma. There is a \$4.00 charge per return plus shipping for 2004, 2005 and 2006 late proforma. Proforma for 2006 fiscal year business returns is automatically run on a monthly basis.

Starter Kits

Starter Kits will begin shipping the second week of January.

Initial RDE Software Shipment

The initial shipment of the UltraTax CS™ version 2007.2 software package and the Exactax RDE Communications Center software is scheduled to be mailed on December 27th to all RDE accounts renewed as of November 30th. This shipment will include instructions on how to restore proforma files included on the RDE Communication software CD.

Important: In the UltraTax program there is a *Proforma* item on the Utility menu. DO NOT use the UltraTax proforma utility. Doing this will cause you to have duplicate files. Only use proforma files restored from the Exactax RDE Communications CD.

Allow approximately two weeks for late renewals or new orders to be shipped.

Courier Service

Exactax will again offer courier service in several metropolitan areas within California. The *2008 Courier Service Application* is enclosed for accounts that used this service last year. If you are interested in using the courier service contact Customer Support for more information.

U.S. Post Office Policy Updated Update (U.S. Post Office Release No. 07-058)

New 13-Ounce Mail Rule to Take Effect July 30, 2007

WASHINGTON, DC — A new Postal Service rule goes into effect next week for packages and envelopes **that weigh more than 13 ounces, if they're being mailed with only stamps as postage** at a location other than a Post Office retail service counter.

Starting Monday, July 30, customers can use one of several convenient online postage applications — available 24/7 — or an Automated Postal Center, if they wish to mail items that weigh more than 13 ounces in Postal Service collection boxes or Post Office lobby mail slots; or if they wish to leave the items for pickup by their letter carriers. Online postage applications include the Postal Service's Click-N-Ship service on usps.com and PC Postage from an authorized USPS vendor.

If a customer is unable to use one of the above methods to prepare and affix postage, items weighing more than 13 ounces must be presented for mailing to an employee at a Post Office retail service counter. Business customers who use postage meters may continue to use meter postage for packages of any weight and mailing method.

Customers will notice new decals on USPS collection boxes, and Post Office lobby and Automated Postal Center mail drop slots. The new red, white and blue decals inform customers that deposit of stamped mail over 13 ounces is prohibited, and any such mail will be returned.

Previously, the prohibition applied to mail over 16 ounces. The change is part of ongoing security measures established by the Postal Service, in cooperation with other government agencies to keep the public, customers, employees and the U.S. Mail safe.

Shipping Options and Rates

UPS Ground will remain the standard method of shipping returns back to our non-courier customers. There is a \$3.00 per return shipping charge, (\$4.15 per-return for delivery points classified by UPS as ‘residential’), added to your normal processing fee for all returns shipped via UPS. To utilize this method of delivery, your shipping address must be a street address; a P.O. Box address is not acceptable.

Selecting UPS enhanced shipping or other options will incur the following per-return charges:

Shipping Method	Per Return Charge
UPS Next Day – 10:30 AM Guarantee	\$27.50
UPS Next Day – 3:00 PM Guarantee	\$18.95
UPS Next Day – Saturday delivery	\$37.50
UPS 2nd Day	\$12.40
Regular US Mail	\$6.00
Confidential Handling	\$3.00
Call When Ready	\$4.00
Special Address	\$4.00

Note: Exactax does not give credit for UPS or free shipping when a package is misplaced by UPS.

Undeliverable Packages

The additional charge for an undeliverable UPS package (to any address) is \$6.00.

Hold for Pick-Up

There is no additional charge for returns marked as “Hold for pick-up” at Exactax. However, returns that are not initially marked as “Hold for pick-up” on Form PI and are subsequently picked-up will still be billed the shipping charge, if any, assigned to that return.


Note: Returns that are designated to be delivered by courier do not incur a default shipping charge when picked up at Exactax.

Important Exactax Telephone Numbers

Main numbers	714- 284-4802	800-352-3638
Customer Support	800-254-2244	
Telephone Rerun	714-239-6139	800-786-4272
Electronic Filing (Batch users)	714-254-7228	
Main fax	714-284-4814	
Customer Support fax	714-254-7210	
Accounting fax	714-999-6566	

Street address: **2301 W Lincoln Ave #100**
Anaheim, CA 92801

Or mail to: **P.O. Box 61048**
Anaheim, CA 92803-6148

 Note: DO NOT send express mail to our P.O. Box; this will delay pick-up by one day or more.

To contact us by e-mail, use the following addresses:

Sales..... **exsales@exactax.com**
Customer Support..... **exsupport@exactax.com**
Electronic Filing..... **efrdeaut@exactax.com**
Technical Support..... **extech@exactax.com**
Administrative..... **exadmin@exactax.com**
Accounting..... **exaccts@exactax.com**

Also, visit our web site: **<http://www.exactax.com>**