

November 3, 2008

Issue 2008-23

(Corrected workshop)

## **ExacNews**

### **Exactax Client:**

The final deadline for all but a few fiscal year returns has passed and everyone at Exactax would like to thank you again for a very successful season. Next year will begin our 20<sup>th</sup> year in business and it looks like it could be a challenging one. With over six major tax bills passed in the last twelve months and probably several more to come under the new administration, taxpayers will be looking for tax professionals to lead them through the quagmire of rules and changes. As always, Exactax will be there to serve you this year and for many more to come.

### **Tax Organizers**

Tax Organizer order forms for 2008 began shipping last week. To change an order or client information to be included in the first run, you must return your order forms by **November 14<sup>th</sup>**. The first run of organizers is scheduled to begin shipping by the end of November.

If you do not request any changes, **OR** you do not return the order form, organizers will be printed based on your original selections shown on your order form. **You will be billed for all printed Organizers and credit will not be issued.** To make changes to a taxpayer's address on the organizer, labels and proforma, submit changes on the 2008 Taxpayer Permanent Address Change Request Form that was included with the Tax Organizer Order Form.

⇒ **Tax Organizers will not be printed for non-renewed or C.O.D. accounts. Late renewal or C.O.D. status will delay the shipping of organizers, proforma and supplies.**

### **Client Labels**

A set of client labels will be shipped at the same time as the Tax Organizers, at no additional charge. The set contains two labels for each 1040 return processed by November 14<sup>th</sup>. An order form for requesting additional billable label sets will be included. To order billable labels prior to November 30<sup>th</sup>, contact Customer Support.

### **Holiday Card/Calendar and Tax Newsletter Deadline Extended**

The deadline for returning your order for the 2008 holiday card/calendar and end-of-year tax newsletters has been extended until November 14<sup>th</sup>. Please return your order ASAP.

### **2009 Workshop Schedule**

The 2009 Exactax workshop schedule and registration forms are included with this bulletin. If you misplaced the schedule or did not receive one, this issue of ExacNews is available on the Exactax web site, [www.exactax.com](http://www.exactax.com).

Select *Support/Bulletins* and click on *November issue 2008.23* or you may call Customer Support.

**RDE Workshop**

There will be one three-hour RDE workshop held on Tuesday, January 20<sup>th</sup> at our Anaheim location. See the attached workshop reservation form to sign up.

**Amending Returns**

When amending a 2004 through 2007 1040 return by rerun, you need to request a check in Box 2 on Form *Amend* [95A] and all of the information from the previous return will be recalled. Enter the explanation for amending and other changes to the return as you normally would. To amend a state return, request a check on that state's amended form in the box labeled '*Transfer original information*'. For example, to amend a California return, check zip box 1 on Form CAAmnd [CA36A] and enter your explanation on Form Amnd-2 [CA36B], zip 19 (or check zip 18 if same as the federal). If there are more than 30 changes in all, you must make all changes on the input forms, including the amended forms, and resubmit them for processing as an initial return.

To amend returns not previously processed through Exactax, you must complete all of the applicable fields on Form *Amend*. Then complete the other input forms, as needed, to produce the new corrected return.

**Hold for Pick-Up**

If you plan to pick up a return that would otherwise be packed for shipping, please call before 3:30 PM and let our Shipping Department know so they can set aside your returns. This will make the pick-up process more efficient for everyone. There is never a charge for returns marked as "Hold for pick-up" at Exactax. However, returns that were **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.

**Billing Queries and Reminders**

When requesting adjustments to your billing, state the problem in the comment section of your remittance and include it with your payment. Any problems or questions regarding billing queries may also be faxed directly to the Accounting Department at 714-999-6566. Requests for credit must be made in writing.

**IMPORTANT: Accounts with an outstanding balance over 21 days will be placed on C.O.D. status. C.O.D. accounts will be shipped UPS C.O.D. until the account is current. → C.O.D. status will delay shipment of proforma and organizers!**

## 2009 ExacTax Workshop Schedule

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Enclosed are your 2009 registration form and workshop schedules. We encourage all of our clients to attend a workshop. The workshop will provide you with a better understanding of our input forms and the general procedures. This will result in less time spent per return and an error free tax return.

Exactax is offering one workshop each day: the Individual workshop is scheduled for the first 2 hours. There will be a short break and the Business (Fiduciary, Corporation, S-corporations and Partnership) will be for the remaining time.

These workshops are offered between January 12<sup>th</sup> and January 16<sup>th</sup>, 2009 and do NOT qualify for CPE credit.

### Workshop Schedule

Registration: 7:30 AM to 8:00 AM

Workshop: 8:00 AM to 12:00 PM (Lunch is not included)

The Individual Workshop will consist of a review of the use of input forms for Form 1040. There will be a review of sample input and procedures. There will also be a discussion of service bureau procedures. The Fiduciary/Business Workshop will consist of a review of the use of input forms for Forms 1041, 1065, 1120 and 1120S. There will be a review of sample input and procedures.

### 2008 RDE Training Workshop

Exactax will be holding one 2008 RDE Update Workshop at our Anaheim location in January. The workshop is recommended for first time users and those who did not attend last year's workshop. It will cover changes and features added for 2008 as well as an overview of how to use the UltraTax product. The three-hour workshop will be held from 9:00AM to 12:00 PM. Space is limited so only registered RDE users may sign up. Complete the registration form on the reverse side or call Customer Support to register for these important training sessions.

Complete the enclosed registration form and return it to the address listed above or fax to (714) 999-6566 prior to December 30<sup>th</sup> to ensure a seat reservation. **One of the benefits included in your annual renewal is one FREE admission to the workshop. There is a \$60 registration fee for any additional attendees.**

A check or credit card authorization must accompany your registration form for additional attendees. Workshop fees cannot be billed to your Exactax account. Your registration fee will be refunded in full provided you cancel your reservation at least 48 hours prior to your scheduled workshop. Registration on the day of the workshop will **not** be accepted.

We at Exactax are dedicated to providing you, our clients, with the highest product quality and best service in the industry.

Thank You,

Exactax



**Southern California Workshop Sessions**

	TYPE	Date	Time	City	Hotel Address
101	1040	Mon. Jan 12	8am-12pm	Torrance, CA	Double Tree Torrance/South
102	Bus/1041				21333 Hawthorne Blvd 310-540-0500
103	1040	Tues. Jan 13	8am-12pm	San Diego, CA	Double Tree Hotel-Club
104	Bus/1041				1515 Hotel Cir S 619-881-6900
105	1040	Wed. Jan 14	8am-12pm	Van Nuys, CA	Airtel Plaza Hotel- <b>Parking \$6.00</b>
106	Bus/1041				7277 Valjean 818-997-7676
107	1040	Thurs. Jan 15	8am-12pm	Buena Park, CA	Holiday Inn
108	Bus/1041				7000 Beach Blvd 714-522-7000
109	1040	Fri. Jan 16	8am-12pm	Ontario, CA	Sheraton Hotel
110	Bus/1041				429 N Vineyard 909-937-8000

**Northern California Workshop Sessions**

	TYPE	Date	Time	City	Hotel Address
201	1040	Mon. Jan 12	8am-12pm	Sacramento, CA 95815	Radisson (corrected)
202	Bus/1041				500 Leisure Lane (916) 920-7354
203	1040	Tues. Jan 13	8am-12pm	Concord, CA	Hilton Hotel
204	Bus/1041				1970 Diamond Blvd 925-827-2000
205	1040	Wed. Jan 14	8am-12pm	San Rafael, CA	Four Points Sheraton
206	Bus/1041				1010 Northgate Dr 415-479-8800
207	1040	Thurs. Jan 15	8am-12pm	San Jose, CA	DoubleTree Hotel <b>Parking \$9.00</b>
208	Bus/1041				2050 Gateway PI 408-453-4000

**Nevada and Hawaii Workshops**

	TYPE	Date	Time	City	Hotel Address
209	1040	Fri. Jan 16	8am-12pm	Henderson, NV	Residence Inn Marriott
210	Bus/1041				2190 Olympic Ave 702-434-2700
211	1040	Fri Jan 23*	8am-12pm	Honolulu, HI	Sheraton Waikiki
212	Bus/1041				2255 Kalakaua Avenue 808-922-4422

\* Subject to final confirmation

**RDE Workshop**

	TYPE	Date	Time	City	Address
300	RDE	Tues. Jan 20	9am-12pm	Anaheim, CA	Exactax Main Office 2301 W. Lincoln Avenue

# 2009 Exactax Workshop Reservation Form

Enter information below for each session you and/or your staff will be attending. All information must be completed. The admission to both workshops for one attendee from your office is FREE. There is a \$60 registration fee for any additional attendees (includes both 1040 & 1041/Bus. workshops). You will receive a ticket(s) confirming your reservation(s). **Your ticket is required for admission to the Workshop.**

**Note: The name of each attendee is mandatory - Please Print**

Session	Type	Date	Last Name	First Name	Workshop Fee
	1040				Free
	1041/Bus.				Free
300	RDE	01/20/09			Free

Complete the information below:

ExacTax Account No. (Required)    -     -    ✓ Check enclosed:  
Check# \_\_\_\_\_

**Credit Card Authorization:**  
(see below)

✓ Bill my credit card

Visa or Mastercard No. \_\_\_\_\_ Exp. Date \_\_\_\_\_ CVN

Name of Cardholder \_\_\_\_\_

Firm Name \_\_\_\_\_

Street \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Daytime Phone No. \_\_\_\_\_ Fax No. \_\_\_\_\_

**Credit Card Billing Address** (If different from the address above)

Street \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

1040/1041 and/or Business workshop(s) \$60.00 X \_\_\_\_\_ (number of attendees) = \$ \_\_\_\_\_

Please fax to: (714) 999-6566

Or, mail this reservation form to:

**Exactax**  
P.O. Box 61048  
Anaheim, CA 92803-6148