

November 17, 2008

Issue 2008-24

## **ExacNews**

### **Exactax Client:**

Things are proceeding smoothly as preparations begin for the 2008 tax filing season. With our new president-elect we are undoubtedly guaranteed a plethora of new law changes - and tax simplification is unlikely to be one of them. In any event, your business should be brisk for at least another four years as your clients will be as confused as ever and looking to you for expert guidance...enjoy your time off while you can!

### **Tax Organizers**

2008 Tax Organizer order forms were mailed out the week of October 27<sup>th</sup>. The first run of organizers is scheduled to begin shipping on December 1<sup>st</sup>.

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 in January for all Organizers printed and credit will not be issued.** If you did not receive your order form please call Customer Support to request a replacement copy.

### **Tax Organizer Envelopes**

Tax Organizer mailing slip sheets will be printed in portrait format (vertical), the same as last year. Exactax does not supply mailing envelopes for the Organizer but you may order them directly at [www.formsCS.com](http://www.formsCS.com) (look under Client Organizers) or by calling the Thomson Forms CS Division at (800) 909-1850. This is a double window 9.5" x 12" envelope, item **CENVFC** (regular adhesive) or **SENVFC** (self-sealing). The minimum order is 100 envelopes.

**Note:** These are the same envelopes provided for mailing the tax return.

### **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 14th. An order form for requesting additional billable label sets will be included. To order billable labels prior to November 30th, contact Customer Support.

### **2009 Workshop Schedule**

The 2009 Exactax workshop schedule and registration forms were included with the November 3<sup>rd</sup> ExacNews. If you misplaced the schedule or did not receive one, that 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 for another copy.

## E-file Questionnaire Included

The 2008 E-file Questionnaire is included with this bulletin. If you are planning to e-file through Exactax for the first time or have changes to your EFIN currently on file with Exactax, complete the questionnaire and return it as soon as possible. If there are no changes please do not return the form.

**Note:** Each type of return to be e-filed through Exactax, (1040, 1041, 1065 and 1120), must be specified on your application to the IRS or you must amend your application to include any new return types.

## No Signature Required

We have received several requests to add a way to mark a UPS shipment as “No signature required” so that the driver will leave the package when no one is available to receive it. UPS does not provide us with an ‘official’ method to specify no signature required. If you write ‘UPS – NO SIGNATURE REQUIRED’ on Form PI, in Notes to Exactax, zip 14, our Shipping Department will place a NO SIGNATURE REQUIRED sticker on the package. However, there is no guarantee that the UPS driver will honor this request. It’s best that you contact your driver directly and let him know how you want your deliveries handled.

## 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!**

# 2008 e-file

## Questionnaire

- Are you filing electronically for the **FIRST TIME** with ExacTax?
- Have you filed a **REVISED Form 8633** since last year? *or*
- Has any of the information below changed?

If any of the above is true, please complete the following information and return this form to ExacTax by mail or FAX by December 31, 2008 *and* attach copies of your *Electronic Filing* letters of acceptance from the IRS and/or State Departments if applicable.

**Note:** Each type of return to be e-filed through ExacTax, (1040, 1041, 1065 and 1120), must be specified on your application to the IRS.

<b>ExacTax Account Number:</b>
<b>Electronic Filer ID Number (EFIN):</b>
<b>Firm Name:</b>
<b>Address:</b>
<b>City/State/Zip:</b>
<b>Contact Name for Electronic Filing:</b>
<b>Phone Number: E-mail Address:</b>
<b>FAX Number:</b> <input type="checkbox"/> Call first before starting FAX
<b>Special Instructions:</b>
<b>Processing Method: (Check all that apply).</b> <input type="checkbox"/> Service Bureau <input type="checkbox"/> Remote Data Entry
<b>Comments:</b>

**ATTN: Electronic Filing Department**  
**Exactax, Inc.**  
P.O Box 61048, Anaheim, CA 92803-6148  
FAX: (714) 284-4210