

October 16, 2009

Issue 2008-22

ExacNews

ExacTax Client:

The last major deadline for filing 2008 returns has passed and everyone at ExacTax would like to thank you again for a very successful season. This concludes our 20th year in business! We would especially like to express our appreciation to the many of you who have been with us all these years. As always, ExacTax will be there to serve you next year and for many more to come.

Tax Organizers

Tax Organizer order forms for 2009 will begin shipping October 26th. To change an order or client information and to be included in the first run, you must return your order forms by **November 13th**. 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 forms, organizers will be printed based on your original selections shown on your order forms. **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 2009 Taxpayer Permanent Address Change Request Form that will be 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 13th. An order form for requesting additional billable label sets will be included. To order billable labels prior to November 30th, contact Customer Support.

Holiday Card/Calendar and Tax Newsletter

The order forms for the 2009 holiday card/calendar and end-of-year tax newsletters will start shipping on October 19th.

2010 Workshop Schedule

The 2010 ExacTax workshop schedule and registration forms will be included with the next issue of ExacNews.

RDE Workshop

There will be one three-hour RDE update workshop held in January at our Anaheim location. The exact date and time will be on the workshop reservation form included in the next issue.

Amending Returns

When amending a 2004 through 2008 1040 return by rerun,

1. Request a check in Zip 2 on Form *Amend* [95A] and all of the information from the previous return will be recalled.
2. Enter the explanation for amending and other changes to the return as you normally would.
3. 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 1 on Form CAAmnd [CA36A] and enter your explanation on Form Amnd-2 [CA36B], zip 9 (or check Zip 8 if same as the federal).
4. 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!*