

November 16, 2009

Issue 2008-24

ExacNews

Exactax Client:

This issue contains the 2010 workshop schedule and reservation form. Please review them and make your reservations as soon as possible to ensure a seat at the location of your choice.

As usual for the last couple of years, the tax laws remain in flux right up to the end of the year. The Worker, Homeownership, and Business Assistance Act of 2009 was signed into law on November 6. The act contains extenders for items such as the First-time Homebuyer's Credit and expands it to certain existing homeowners. Beginning in 2011 it also includes mandatory e-filing for most professional preparers. The health care initiative is currently up in the air and will likely impact the 2010 return if passed this year. We will let you know how these and other changes affect the input forms at the update workshops.

Tax Organizers

The 2009 Tax Organizer order forms were sent out in October. To change an order or client information to be included in the first run, you had to return your order forms and change forms by **November 13th**. The first run of organizers is scheduled to begin shipping by the end of November.

If you did not request any changes, **OR** you did not return the order form, organizers will be printed based on your original pre-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 2009 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 with the Tax Organizers, at no additional charge. If you did not order Organizers, your label set will be sent when Organizer orders are shipped. A label 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 Deadline

The deadline for returning your order for the 2009 holiday card/calendar and end-of-year tax newsletters was November 13th. All orders received by the deadline are currently being processed.

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. To view or reprint, Select *Support/Bulletins* and click on *November issue 2009.24* or you may call Customer Support.

RDE Workshop

There will be one three-hour RDE workshop held on Tuesday, January 19th at our Anaheim location. See the attached workshop reservation form to sign up.

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, labels and organizers!

2010 ExacTax Workshop Schedule

Enclosed are your 2010 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 11th and January 15th, 2010 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.

2009 RDE Training Workshop

Exactax will be holding one 2009 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 2009 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 31st to ensure a seat reservation. A confirmation card will be mailed to you. **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, subject to availability.**

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 11	8am-12pm	Torrance, CA	Double Tree Torrance/South 21333 Hawthorne Blvd 310-540-0500
102	Bus/1041				
103	1040	Tue. Jan 12	8am-12pm	San Diego, CA	Double Tree Hotel-Club 1515 Hotel Cir S 619-881-6900
104	Bus/1041				
105	1040	Wed. Jan 13	8am-12pm	Van Nuys, CA	Airtel Plaza Hotel (Parking \$5.00) 7277 Valjean 818-997-7676
106	Bus/1041				
107	1040	Thu. Jan 14	8am-12pm	Buena Park, CA	Holiday Inn 7000 Beach Blvd 714-522-7000
108	Bus/1041				
109	1040	Fri. Jan 15	8am-12pm	Ontario, CA	Sheraton Hotel 429 N Vineyard 909-937-8000
110	Bus/1041				

Northern California Workshop Sessions

	TYPE	Date	Time	City	Hotel Address
201	1040	Mon. Jan 11	8am-12pm	Sacramento, CA 95815	Radisson (Note: There are <u>2</u> Radissons) 500 Leisure Lane (916) 920-7354
202	Bus/1041				
203	1040	Tue. Jan 12	8am-12pm	Concord, CA	Hilton Hotel 1970 Diamond Blvd 925-827-2000
204	Bus/1041				
205	1040	Wed. Jan 13	8am-12pm	San Rafael, CA	Four Points Sheraton 1010 Northgate DR 415-479-8800
206	Bus/1041				
207	1040	Thu. Jan 14	8am-12pm	San Jose, CA	DoubleTree Hotel (Parking \$7.00) 2050 Gateway PL 408-453-4000
208	Bus/1041				

Hawaii Workshop

	TYPE	Date	Time	City	Hotel Address
211	1040	Fri. Jan 22	8am-12pm	Honolulu, HI	To Be Added
212	Bus/1041				

RDE Update Workshop

	TYPE	Date	Time	City	Address
300	RDE	Tue. Jan 19	9am-12pm	Anaheim, CA	Exactax Main Office 2301 W. Lincoln Avenue

2010 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	01/19/10			Free

Complete the information below:

ExacTax Account No. (Required) - -

✓ Check enclosed: Check #: _____

✓ Bill my credit card: (see below)

Credit Card Authorization:

Visa/Mastercard/Amex No. _____ Exp. Date _____ CVN

Name of Cardholder _____

Enter 3 or 4 digit code

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