A public accounting and tax firm
of Lawrence R. Yoder CPA

Advising for the 21st century

HORIZON ACCOUNTANTS

Member of the American Institute
of Certified Public Accountants

Licensed in New York and Virginia

Fall 2020: New or Existing Client Letter and Billing Understanding

Welcome to Horizon Accountants!

We look forward to working with you, your family and business endeavors. We have structured our firm to provide a pleasing and efficient service to you. While we are not perfect nor claim to know everything about taxation, we have over 32 years of managing experience in the fields of accounting, taxation, business advising and negotiation.

First and foremost, we are a public accounting firm. As owner and CPA, Lawrence abides by a code of ethics. In other words, he simply cannot just do whatever he wants but has an obligation to both the client and the taxing authority. He is charged with the responsibility to provide clients to pay the least amount of tax under the laws. Our firm has been known to be highly creative and it utilizes many contacts within the law profession and others.

You may ask, "What all am I paying you for?" This is a wonderful question. Our billing rates and invoicing for services includes more than just the delivery of a tax return. The basic cost of preparing your tax return is based on a standard billing sheet, by form prepared, combined with complexity and risk. Some individuals may have schedule C, a farm or even multiple rental property forms. These all add to the cost of return preparation. Being a Horizon client gains you access to us for the entire year. You are free to contact us with your questions and we do not bill for our time if less than 10 minutes. Sometimes, we reply to as many as two to four emails or phone calls a day just answering simple questions. Our clients have come to value our prompt replies and attention to their requests. These contacts do not cost you more. In addition, our pricing includes the following:

- An annual tax appointment and exit interview
- Federal and State Income tax returns prepared and e-filed
- Client data safeguarded and secure transmission to taxing authorities
- Client copy can be scanned into a pdf if requested and sent to their personal email
- Clients needing tax returns sent to banks or third parties are encouraged to have them sent to their personal email account at no extra billing cost
- Year-round access to us
- Depreciation schedules created for the client and maintained annually
- Updated website of pertinent information you may need to know
- An annual free financial planning consultation of 20 minutes or less
- Access to key professional relationships in our sphere of influence

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- Mailing letters, correspondence, or payments you drop by
- Email correspondence is normally followed up on within 24 hours
- Access to Halieus Investment Advisors LLC experience of five years

Besides individual tax preparation we provide services to businesses (separate entities), not for profits, churches, estates, and trusts. These are separate billing functions than the individual fee. These types of services are naturally more complex and far reaching. These too include more than just the preparation of a business or entity tax return but provide access for advice and us being a sounding board. We have may people within the surrounding communities simply calling us for certain levels of advice. We are engaged for special projects throughout the year. Billing of these services is more a function of each separate business.

Our separate entity (other than a Schedule C, F or E) pricing includes the following:

- An annual tax appointment and exit interview
- Federal and State Income tax returns prepared and e-filed
- Business data safeguarded and secure transmission to taxing authorities
- Client copy can be scanned into a pdf if requested and sent to their personal email
- Clients needing tax returns sent to banks or third parties are encouraged to have them sent to their personal email account at no extra billing cost
- Year-round access to us
- Depreciation schedules created for the client and maintained annually
- 32 years of advising, transaction structuring and compliance experience
- Questions of compliance or management's ideas are freely shared and advised on if less than 10 minutes.
- Updated website of pertinent information you may need to know
- Access to key professional relationships in our sphere of influence
- Mailing letters, correspondence, or payments you drop by
- Email correspondence is normally followed up on within 24 hours

We look forward to a long and prosperous relationship. We believe our menu of services provides a tremendous value to you, your family and business endeavors.

Lawrence R Yoder, CPA