Making Life Less Taxing

INDIVIDUAL CLIENT WELCOME PACKET

CHANDLER & KNOWLES
CPAs, PLLC

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FLOWER MOUND, TX 75022

ROCHELLE CHANDLER

KRISTINA KNOWLES

CONTENTS

WE'RE EXCITED TO WORK WITH YOU!

Thank you for choosing Chandler & Knowles CPAs PLLC. We know your time is valuable, and our goal is to make your financial experience as smooth and stress-free as possible.

From tax filings to strategic business advice, we're here to support your success year-round. This guide contains everything you need to get started—our process, important dates, secure document instructions, and key contacts.

Let's get started!

Rochelle Chandler & Kristina Knowles

ROCHELLE CHANDLER, CPA

Managing Partner

KRISTINA KNOWLES, CPA

Partner

HOW TO REACH US

Email: clientservices@chandlerknowlescpa.com (Response within 2 business days)

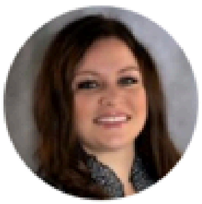
Phone: (817) 430-3000

Non-Tax Season Office Hours: Mon.–Fri., 8:30 AM – 4:00 PM CST

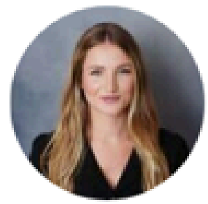
Tax Season Office Hours: Mon.-Fri., 8:30 AM - 5:00 PM CST / Select Sat., 9:00 AM - 1:00 PM

Website: www.chandlerknowlescpa.com

MEET YOUR TEAM



Meagan Smith
Director of Production and Staff Accountant



Mae Bradley
Business Manager

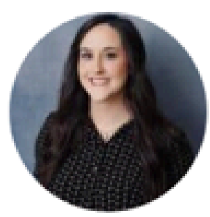
Derrick Williams
CPA & Tax Accountant

Lindsey Welch
Office Manager

Elisa Mann
Tax Preparer

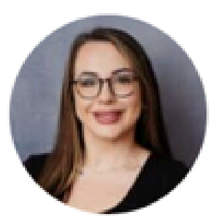
Brenda Hoyt-Stenovitch
Executive Assistant for Practice Development

Suzanne Zeigler
Bookkeeper & Payroll Specialist



Angela Crawford
Projects Analytics Coordinator

Camille Bradley
Advanced Planning Coordinator
Bookkeeping/Payroll Specialist

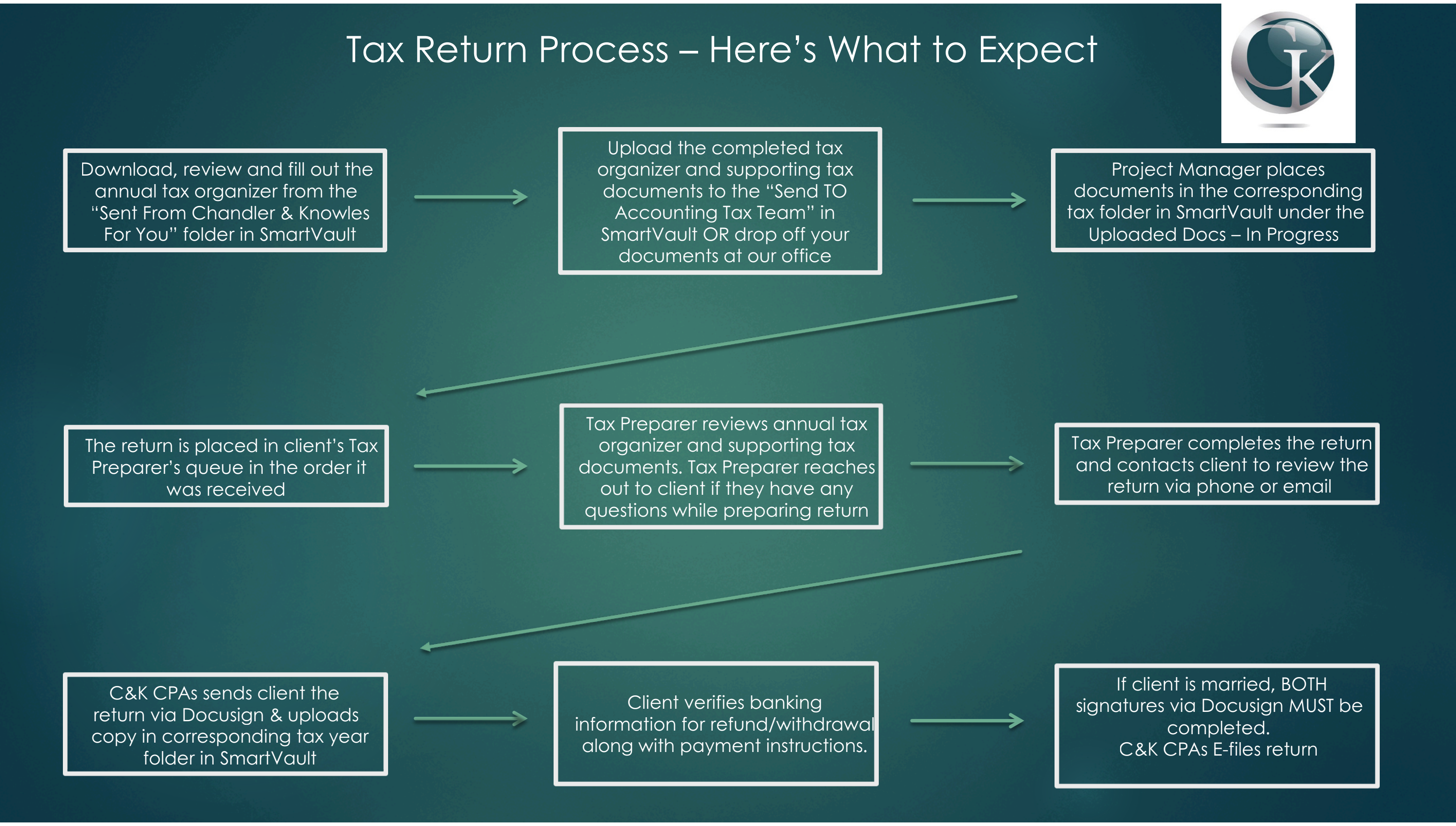


Rylee Morris
Production Support Analyst

WHAT TO EXPECT NEXT

- Introductory email or call from your assigned tax preparer.
- Email from our Client Service team requesting further information or necessary documents.

Once we've received all your onboarding documents, you'll be connected with your assigned tax preparer. Their introductory email may come as quickly as 24–48 hours, or in some cases, it may take a couple of weeks if additional items are still needed to complete the setup.



KEY DEADLINES

Date	What's Due
January 31	Annual Tax Organizers to Clients
April 15	• Individual Returns (1040) • IRS Payment (if applicable) • Individual Return Extension (if applicable) • Prior tax year extension payment • Current year 1st quarter estimated tax payment
October 15	• Extended Individual Returns
December 1	End of Year Email to Clients

Our firm operates on a first in/first out basis. We will send reminders ahead of every deadline.

Tip: We cannot begin tax preparation until we have received ALL supporting tax documents and a completed annual tax organizer.

Automatic Extension Policy

In the best interest of our clients, CKCPAs will automatically file a tax extension on April 1st for any client whose return has not yet been filed. To ensure we can provide an accurate estimated tax payment to the IRS, we must receive all supporting tax documents. Please note that estimated payments are due to the IRS by April 15th.

****An extension is only for the return, not payment to the IRS.****

SMARTVAULT
YOUR SECURE CLIENT PORTAL

SmartVault: Please use this link to familiarize yourself with the program.

Learn How To Activate & Use Your SmartVault

Send TO Chandler & Knowles Folder:

This is where you upload documents for your tax preparer.

Sent FROM Chandler & Knowles For YOU Folder:

This is where you will receive Action Required documents from your tax preparer.

TY00 Folder:

TY stands for Tax Year. Numbers after TY tells you the year. EX: TY24 is Tax Year 2024. Documents for according tax year will be placed within this folder.

Uploaded Documents - In Progress Folder:

Once you have uploaded supporting tax documents, they are then placed in this folder. You are able to see what you have submitted by clicking in this folder.

Source Documents Folder:

Once your tax preparer has entered in the information needed from your document, it is then placed in this folder.

Tax Return Folder:

This is where you can find your completed tax return.

Government Notices Folder:

If there is any correspondence with the IRS, this is were the letters are saved.

FREQUENTLY ASKED QUESTIONS

Q: DO I HAVE TO FILL OUT THE ANNUAL TAX ORGANIZER?

A: Yes. The annual tax organizer changes every year and is mandatory to be completely filled out for tax preparation.

Q: WHAT IF I DON'T TURN MY DOCUMENTS IN TIME FOR A COMPLETE RETURN BY THE DEADLINE?

A: We follow a first in/first out method for preparing items. If we lack all the necessary supporting tax documents, it may cause delays in tax preparation. Our Client Service team excels in communication regarding any missing items. Our firm will automatically file an extension on your behalf. Please see our Automatic Extension Policy.

Q: WILL YOU REMIND ME ABOUT DEADLINES?

A: Yes. We send reminders via email, newsletters and SMS text (if opted in).

Q: HOW DO I SIGN MY RETURN ONCE I APPROVE IT?

A: Both you and your spouse (if applicable) will be sent your return to each of your email address via Docusign, which allows you to sign electronically. Please note there are a handful of identity authentication steps to complete.
You can disregard the DO NOT FILE watermark on the tax return included in the email from Docusign.

Q: CAN I COME INTO THE OFFICE FOR AN INPERSON

A: Yes. You can schedule an in person meeting May-January.

OUR SERVICES FOR YOU

We want to take a moment to express our sincere thanks for the trust you've placed in Chandler & Knowles CPAs PLLC. It's truly a pleasure working with you, and we're honored to be your chosen partner in financial and tax matters.

As we continue our partnership, we'd like to provide a quick refresher on the range of services we offer.

Below is a list of the core services we offer:

- **Tax Preparation & Planning**- Individual, business and corporate tax returns with proactive planning strategies
- **IRS Representation**- Professional representation for audits, notices or other tax matters
- **Advisory**- Strategic financial guidance to support growth and tax-efficient decision-making
- **Trust & Estate Planning**- Strategies to protect your assets and ensure a smooth transition of wealth
- **Retirement Planning**- Assistance in creating strategies to help you save, invest and plan for the future to ensure financial security
- **Entity Formation**- Assistance in selecting and setting up the right legal structure tailored to your goals and tax strategy
- **Bookkeeping & Financial Reporting**- Accurate recordkeeping and customized financial reports
- **Payroll Services**- Reliable and compliant payroll processing

In addition to these services, we offer tailored solutions based on your specific needs. You'll also receive our monthly newsletter, which includes important tax updates, deadline reminders, and timely insights to keep you informed.

We also host live webinars on key topics throughout the year. Invitations will be sent a few weeks in advance, and recordings are made available afterward if you're unable to attend live.

We'd love to schedule a quick call to review your current tax situation and discuss how our **advisory services** can support you—from tax strategy through to retirement planning. Please use the link below to schedule a call with **Rochelle Chandler, Jordan Pence, and Camille Bradley.**

Meeting Link