Let’s Get Started

Kindly take a moment to familiarize yourself with our important outlines and service delivery before commencing any work with us.

We offer **a free 60-minute initial consultation**, during which we will assess your situation and discuss your business and personal endeavors. You will have the opportunity to ask us specific questions, and we will provide you with a detailed response either verbally or in written format.

After the initial consultation, we will present you with a proposal for our services. Signing the engagement indicates your agreement to commence services.

Payment for our services is due **within 30 days** of the engagement being signed. If you prefer installment payments, please let us know. We will send you an invoice via email with a secure link for payment.

Communication Methods:

Phone Calls: All phone calls with us should be scheduled in advance, you have access to the calendar via the website, it’s recommended to schedule a call at least once a quarter. These calls help us better understand your needs and find ways to assist you efficiently. Additionally, scheduled calls eliminate numerous questions that may arise at the yearend if we have not communicated much, and it enables me to prepare Tax Projections and Returns accurately.

Chatroom: For quick and casual communications with clients, we use WhatsApp. Please download the application and find me under "Fair and Square Accounting 2," associated with the phone number 551-226-7779. I review and respond to clients' inquiries daily. However, if the topic is complicated, kindly send an email instead and allow 2 business days for a response. Furthermore, it is strongly recommended **not to send** any private or sensitive information via WhatsApp.
https://web.whatsapp.com/

Emails: Traditional email communication is the preferred method for any complicated situations or topics that require follow-up. The email trail helps us assess the situation quickly and respond to clients faster.

Sharing Documents.

After signing the engagement, you will receive a link to the "Doc Folder" via OneDrive, where you can securely share any confidential or sensitive information. This option is available for clients who prefer not to send documents via email and wish to take extra precautions. If you use QuickBooks Online (QBO), please share any bookkeeping-related documents through QBO.
Furthermore, during the tax preparation process, clients will receive an email with a link to the "Intuit Link" portal, where they can securely set up an account and upload their documents. You will need to create an account and keep it as long as you continue to use our services. The portal will also remain copies of all tax returns filed with us.

Thank you for your interest in our services, we are excited to work with you!