



## Only Tax Support for Epic Members – sign up today!

**Transitioning to a Monthly Fee System:** Starting September 2023, we will be transitioning to a Members Only structure. We will only prepare future tax returns when you sign a new Service Agreement that includes a monthly membership fee that is based on your previous return divided by 12 months. This transition reflects our commitment to offering you a seamless and comprehensive service experience. Instead of being charged on a per-form basis, you will now enjoy the benefits of a fixed monthly fee for our top-notch tax preparation services.

**Streamlined Experience and Added Value:** With this new fee structure, you can easily budget your financial planning with greater accuracy. This change is designed to align with your evolving needs and simplify your interaction with our range of financial services. We understand that life is dynamic, and our goal is to provide you with the flexibility and peace of mind you deserve.

**What's Included in Your Monthly Fee:** Your monthly fee will encompass a comprehensive suite of tax-related services. This includes tax preparation, filing, compliance, and consultation. The service you've come to rely on within our office will now be known as "Essentials Tax Support." In addition to its existing features, we are excited to introduce monthly workshops and enhanced individual client support to this package, ensuring you have all the tools you need to navigate your financial journey successfully.

**Tailored Pricing for Your Unique Needs:** We understand that every client's financial situation is unique. Therefore, your monthly investment in our services will be tailored to the complexity of your tax situation, specific forms and filings, and your IRS compliance requirements. Our commitment to providing you with personalized, consistent, and high-quality work remains unwavering.

**Support Every Step of the Way:** We acknowledge that changes, particularly in billing structures, can prompt questions. Our dedicated team is ready to address any inquiries you may have. Whether through phone or email, we are readily available to guide you through these changes and ensure your transition to the new fee structure is smooth.

**A Partnership for Your Financial Goals:** At Epic Trust Tax, we view our relationship with you as a partnership focused on achieving your family's financial aspirations. If you find that your current service package doesn't fully align with your needs, we invite you to contact us. Together, we can customize a solution that precisely fits your requirements.

We sincerely appreciate your trust in our services and look forward to embarking on this exciting journey together. As a token of our gratitude for your support during this transition (while supplies last), we have a special gift for you when you return the completed service agreement form to our office.

Thank you for choosing Epic Trust Tax as your financial partner. We remain committed to providing you with exceptional service and guiding you towards a prosperous financial future.

## FAQ – Frequently Asked Questions

1. **What kind of Enhanced Services will see:** By offering a monthly fee, they can provide ongoing support and advice throughout the year, such as tax planning, financial consultations, or access to tax professionals for questions and guidance.
2. **How is the Cost Distribution aligned with my fee:** The monthly fee model allows the tax service to distribute costs more evenly throughout the year. With a traditional per-return or per-service fee structure, most revenue is generated during the busy tax season, leaving the service with limited availability to support our client during that time. With a monthly membership we will balance our services throughout the year.
3. **How will this improve Convenience for me and/or my Business:** Our clients prefer a monthly fee structure because it offers predictable billing and spreads out the cost over time. This can be especially beneficial for individuals or businesses on a budget who want to manage their expenses more easily.
4. **How will this change increase Client Satisfaction:** By adopting a monthly fee model, the tax service may aim to build stronger relationships with clients and encourage long-term loyalty. The ongoing support and services provided throughout the year can create a more engaged client base, reducing the likelihood of clients switching to other tax service providers.
5. **What different Membership options are available:** The 3-tier tax support: Essential, Full Support and Premium support. Premium support allows for multiple tax consultation meetings throughout the year to reduce tax liability, understand your options, increase profits, meet goals, etc.
6. **Why is the Tax Preparation Services switching to Monthly billing?** Monthly billing can lead to more regular interactions between the service provider and the clients. This can facilitate ongoing communication and support throughout the year, rather than only during the tax season.
7. **Will my Tax Preparation process change under the new billing system?** Instead of paying for the tax preparation service in one lump sum during tax season, you will now make monthly payments throughout the year.
8. **How will the transition from the previous billing system to the new monthly billing be handled?** You will need to sign a new Service Agreement to update your new billing that is related to your most recent Tax Preparation billing. Contact our office to assist clients with billing-related inquiries.
9. **Will I still have access to customer support and assistance throughout the year?** Premium Membership Service includes year-round support and assistance with quarterly meetings to strategically address tax liability as well as address any other concerns.
10. **How will my payment be processed each month?** All payment processing will follow the service agreement payment process on file.



11. **Will the overall cost increase or decrease with the monthly billing option?** Tax preparation services offer promotional pricing and discounts for signing up for the monthly billing option. We will no longer offer one time tax preparation as of 2024.
  
12. **Can I cancel or change my membership at any time, and will there be any associated fees?** You may change your membership at any time. Due to limited client membership, there will be no refunds.