

## Frequently Asked Questions

### **What happens if I sign the release form?**

If you sign the release form, Palmer Hammond will have care and custody of your past returns. If you need them, you can call Palmer Hammond at 508-832-0114 and request the documents. If you don't sign the form, McCullough & Associates will continue to maintain the records, however, you may have limited access.

### **Will Palmer Hammond have my personal information?**

Palmer Hammond will only obtain your personal Tax Records if you opt in. No personal financial information will be shared otherwise.

### **Will my personal information be safe?**

Palmer Hammond takes your personal information seriously and has invested in the latest technology to ensure that your personal private information is safe, including secure upload, encryption, secure network, multi-factor authentication, and internal protocols and processes to securely house physical documents.

### **How can I trust Palmer Hammond?**

Every employee at Palmer Hammond has undergone and passed criminal background checks by the government and regulatory authorities. The tax preparers must have PTIN (Personal Tax Identification Number). Palmer Hammond is registered with the IRS with the EFIN 047363.

### **What if I want to use a different Tax Preparer?**

You are free to use whomever you want to prepare your taxes. We have chosen Nick of Palmer Hammond as our successor, because we believe his business philosophy, acumen and dedication to the relationship with his clients is similar to our philosophy.

### **Auburn is too far, can I still use Palmer Hammond?**

Yes, Palmer Hammond has made it easy for you to get your documents to them. We have worked out 2 options! 1.) You simply upload your tax documents through the Palmer Hammond website. 2.) You can still use the secure drop box at our office, and they will personally pick up your documents. Either way, they'll call you afterwards to gather any additional information needed, process the return, and then both email you and snail mail you a copy of your tax return.

### **Is Palmer Hammond more expensive?**

One of our priorities was to find a firm that had similar pricing to our firm. Nick has committed to maintaining similar pricing as McCullough & Associates. The base pricing for individual/joint 1040 & 1 state is \$229. There are additional charges for multi-states, small businesses (sched C), rental property (sched E) & sale of business assets. Nick's firm provides up-front pricing, so should there be an increase from the base price, they will notify you before they process your return.

### **What if I don't sign the release now, can Palmer Hammond still do my taxes?**

Yes, but the process will be a bit slower. Palmer Hammond will welcome you, but as a completely new client, they will not have access to past year's tax information.

### **Can I have a meeting with Nick and his staff before I agree to this?**

Yes, Nick has a wonderful staff, and they would love to meet you. Diane, who is helping with the transition will be reaching out to see if you'd like to go to his office, have him stop by your home or meet for coffee. If you want to set something up beforehand, you can call 508-832-0114.

### **Can I sign the Release form electronically?**

Yes, but remember if you're married you and your spouse will have to sign individually. Simply scan the QR code below, and follow the prompts and Opt-In. We'll take care of the rest.

Best Wishes,

Bill & Kathy

