

## 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, Smart Tax Advisor 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 federal government and regulatory authorities. The tax preparers must have PTIN (Personal Tax Identification Number). Palmer Hammond is registered with the IRS with an EFIN 047363.

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

You are free to use whoever you want to prepare your taxes. We have chosen Nick at 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?**

Palmer Hammond is retaining our Millbury office and our staff! You may also use their Auburn location, whichever is most convenient. They offer 100% remote options, too. You simply upload your tax documents through the upload portal at [www.PalmerHammond.com](http://www.PalmerHammond.com). 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 pricing to Smart Tax Advisor. Palmer Hammond provides up-front pricing, so you always know the price of your tax return before they process it.

### **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 the Palmer Hammond staff, before I agree to this?**

Yes, Nick has a wonderful staff, and they would love to meet you. The transition team will be reaching out to say hello and answer any questions you may have. If you want to set something up beforehand you can call 508-832-0114 or e-mail [contactus@palmerhammond.com](mailto:contactus@palmerhammond.com). They offer appointments via Zoom, phone and in-person.

### **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, follow the prompts, and opt-in. We'll take care of the rest.

Best Wishes,

Paul Dion, CPA

Smart Tax Advisor

