NEW CLIENT CHECKLIST

Follow this checklist to make sure you won't miss a thing!

RADER & RADER
CERTIFIED PUBLIC ACCOUNTANTS AND FINANCIAL ADVISORS
Serving Central Indiana Since 1964

CONNECT

- [ ] Log in to the **Rader and Rader portal** - https://raderandrader.client.myfirm360.com/
You will need your email address, the last four digits of your Social Security Number, and your mobile phone.

- [ ] Bookmark our **website** - www.raderandrader.com
We have an entire Client Resources section at your disposal with helpful links, documents, articles, and more.

- [ ] Add us to your **contacts** - officestaff@raderandrader.com
We periodically send out emails with important updates and they will come from this email address. Make sure you add it to your safe senders list so it doesn't end up in spam!

SHARE

- [ ] If you haven't already, please provide us with **copies of your last 3 tax returns**. You can upload them directly to your secure portal at the link above or drop them by the office.

- [ ] If you use QuickBooks Online for your business, make sure you send an accountant user invite to officestaff@raderandrader.com so that we can access your books.

SIGN – BUSINESSES ONLY

- [ ] **Engagement Letter** - You should have received an email via RightSignature to sign your engagement letter. If you don't see it in the next 3 days, please give us a call. Depending on when we're starting your work, you may receive 2 engagement letters to sign.

- [ ] **Capitalization Policy** - You should receive an additional email via RightSignature to sign a capitalization policy. This is just for our records and states that you choose to expense items under $2,500 in the year of purchase instead of adding them to your asset list and depreciating them over their useful lives.

GENERAL INFORMATION

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Helpful Information to Keep Us Connected

CONTACT INFORMATION

Phone Number: (317) 272-4650 Fax Number: (317) 272-4652
Email: officestaff@raderandrader.com Website: www.raderandrader.com
Address: 6220 E US Highway 36, Suite A, Avon, IN 46123

OFFICE HOURS

Monday through Friday 8:00am – 4:30pm

Saturdays are by appointment only from February 1st – April 15th.

Note: From Memorial Day to the end of August, our office is closed on Fridays. You can still reach out to your CPA and schedule an appointment (phone call, in-person, or virtual) for a Friday, if needed.

BILLING INFORMATION

Payments are due within 30 days of the invoice date. A finance charge of 1 1/2% per month (18% per annum) added after 30 days. You can pay with check or card. To pay online, you can log in to your Rader & Rader portal at: https://raderandrader.client.myfirm360.com/

DEADLINES

Some of the most common filing deadlines:
January 31st - 1099s and W-2s due to IRS and recipients
March 15th - S Corporation and Partnership Tax Return Filing Deadline
April 15th - Individual and C Corporation Tax Return Filing Deadline
May 15th - Indiana Business Personal Property Tax Return Filing Deadline
September 15th - Extended S Corporation and Partnership Tax Return Filing Deadline
October 15th - Extended Individual and C Corporation Tax Return Filing Deadline

Some of the most common payment deadlines:
Individual Income Tax Estimates - April 15, June 15, September 15, January 15
Corporation Federal Income Tax Estimates - April 15, June 15, September 15, December 15
Corporation Indiana Income Tax Estimates - April 20, June 20, September 20, December 20

EXPECTATIONS LIST

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To make sure that we can provide the best possible service for you, we've put together a list of what you can expect from us and what we'll need from you to do our job well.

OUR VISION STATEMENT

We strive to help individuals and small businesses cultivate long-term financial success. It is our commitment to make each of our clients and their financial needs our priority.

YOU CAN EXPECT US TO:

- Respond to your email or message within 48 hours or less during normal business hours – even if it's just to let you know that we're researching your question.
- Complete your work with integrity.
- Stay informed of changes in tax laws and regulations.
- Update you with the information you need to run your business and/or manage your personal finances.
- Provide helpful guidance and advice to reach your goals.
- Explain any concepts, laws, procedures, etc. that you have questions about.

WHAT WE EXPECT FROM YOU:

- Provide requested information in a timely manner.
- Keep us updated with any correspondence from taxing authorities.
- Be responsible for knowing upcoming deadlines.
- Ask us questions when you're unsure about a procedure, tax law, etc.
- Trust that we have your best interests in mind.