

Dear New Client,

I would like to take a moment to officially welcome you to the firm. We are truly thankful to have you as a client of Bee, Bergvall & Co. for your tax and/or advisory needs.

Since its inception over 40 years ago, Bee, Bergvall & Co. has built a firm that is known for its innovation, knowledge and experience in accounting, auditing, as well as tax. As a tax client, we understand that your tax return is just one piece of your financial picture. The team at Bee, Bergvall & Co. is available to bring value to you throughout the year, not just at tax season and therefore we will be available to answer your questions at any time. We encourage our clients to contact us prior to making a major life decision or in the event of a change in their personal tax situation. Often questions can be answered simply; however, if your situation is more complicated, we would inform you *upfront* if your issue requires additional attention.

### IMPORTANT Information for the 2024 Tax Season

We will continue to follow CDC guidelines in 2024. For your safety, please note the following:

- **Client Intake Forms** are to be completed by all new clients. Please return your completed [Client Intake form](#) via our [Safesend Drop Off Link](#)
- A **Secure SafeSend portal** is available for the transmission of tax documents as well as your completed tax return. You'll find a link on our website at <https://bbcocpa.com/secure-file-upload/>.
- **Electronic signatures** will enable clients to 'sign' documents pertaining to tax returns without the need to exchange paper documents.
- **Electronic credit card payments** are accepted for preparation fees, via our website [www.bbco-cpa.com](http://www.bbco-cpa.com).
- For those unable to utilize the electronic portal, returns will still be accepted via the US mail or the locked box at our Warrington Office. Arrangements via limited hours, and following CDC protocols, may also be made to leave documents at our Richboro location.
- **Tax Organizers** are available for those who find value in using them. Electronic and paper options are available. Please e-mail: [info@bbco-cpa.com](mailto:info@bbco-cpa.com) with "Organizers" in the subject line and we will contact you regarding the delivery of your Organizer.

Additional information about the firm that may be helpful to you:

- We have two office locations--Warrington & Richboro. We invite you to utilize the office that is most convenient for you.
- Connect with us on Facebook & Linked-In. We post tips, tax updates and other items of interest.
- Look for our monthly e-news which contains articles of interest for individuals and businesses. (Note: if you are not receiving the e-news, please contact [lvibber@bbco-cpa.com](mailto:lvibber@bbco-cpa.com)).
- We offer a \$25 referral bonus to clients who make referrals of new clients to the firm. If you refer someone to us, make sure you let them know to mention it!

We look forward to working with you and strive to make the transition to our firm seamless and your experience positive. If you have issues or concerns that you'd like to discuss, I invite you to contact me immediately ([lvibber@bbco-cpa.com](mailto:lvibber@bbco-cpa.com)) and I'll connect you to your tax preparer.

Regards,



Elizabeth Vibber  
Marketing Director