



FEE & GUARANTEE DISCLOSURE

We want to provide the best possible service to our clients. **Please take the time to read the following information carefully and completely.** Please note that your tax bill will be reasonably higher based on updated governmental tax regulations.

Our Guarantees to You

- We will notify you of **ways that your tax burden can be reduced.**
- We will provide **online access** to your current year tax returns and source documents through the client portal; some prior year information may also be available. **If you do not yet have a client portal we charge a one-time set-up fee of \$35.**
- We will provide **free electronic filing** of your tax returns with the appropriate taxing authorities and free email notifications when your e-filed tax returns have been accepted¹. Please be sure to give us your most current email when you supply us with your tax documents.

The Investment

- Your all-inclusive investment with us, assuming no material changes² from the prior year, will be similar to the prior year with us, considering the industry-standard annual inflation.
- **The full fee is due when your returns are completed.**

Your Guarantees to Us

- You will do your best to accumulate your tax information in an orderly manner and submit the information as early as possible.
- You understand that no appointments will be scheduled during 'tax crunch time' (April 1 – April 15).
- You understand that if you submit your tax documents to us after April 15, it may take additional time for your tax return to be ready based on adjusted seasonal hours.

Notes:

1. Some tax authorities require returns to be filed by paper. All returns allowed to be e-filed will be e-filed. Email notification of receipt only applies to returns that are electronically filed.
2. This is only valid for returns received on or before March 1, 2024. If you owe taxes, you may incur penalties and interest charges for payments received after April 15, Nelson Co. will not be responsible for those interest charges and/or penalties.

PAYMENT DETAILS

Ways to make your payment:

1. **ONLINE** - You may pay through the link on our website (<https://nelsontax.com/online-payments/>).
2. **CASH** - You may drop it off at our office (7155 SW Varns St Suite 120, Tigard OR 97223) during business hours.
3. **CHECK** - You may pay by check by dropping it off at our office as above, or mailing it to:
7155 SW Varns St Suite 120, Tigard OR 97223
4. **CREDIT/DEBIT CARD** - Please complete the information below and return it to us. You may drop this off at our office as in #1 above, mail it to us as in #2 above, fax it to us at (503) 620-9065 or upload it to your portal (please [email Becky](#) to let her know that you have uploaded it).

_____ CREDIT CARD INFO _____

Name on Card: _____ Amount to Pay: _____

Card Number: _____ Expiration Date: _____

Signature: _____ Security Code: _____ Zip Code: _____

You may drop this document off at our office, mail it, fax it, or upload it. See payment options above. Email is not a secure method to transmit your credit card number.