



CLIENT BILL OF RIGHTS

We believe that expert CPA services are not just a privilege for large organizations – they're a fundamental right of every individual and business. As such, we have developed a client bill of rights to provide transparency and accountability to everyone with whom we work.

- All phone calls, emails, and other inquiries will be responded to in a timely manner.
- Professional services will be presented in a courteous and respectful manner.
- Open communication and one-on-one interaction will be promoted to ensure excellent relationships.
- Proactive and strategic recommendations will be made with the future in mind as we welcome the opportunities that innovation brings.
- Reliable and accurate services will be provided in a timely and efficient manner.
- You will be communicated with on a personal level to ensure long-lasting relationships.
- Persistence in developing high-quality and creative solutions unique to your individual situation will be evident.
- Guidance and direction received will be as current and knowledgeable as possible through our professionals' dedication to never stop learning nor expanding their networks.

SORREN BILL OF RIGHTS

- We work by appointment only and our executive assistants can assist you in getting an appointment scheduled when needed.
- Email is our preferred communication method.
- We request that all tax documents be submitted at least 4 weeks prior to a tax deadline to ensure the return can complete all stages of review.
- If additional information is needed during your engagement, we expect that this will be provided in a timely manner to keep your project on time.
- We prefer that files are emailed securely through SafeSend, by using the link at the bottom of our email signatures, or on the homepage of our website. We take your privacy and security seriously.
- When ready, your return/financial statements will be delivered electronically via SafeSend Returns.
- We expect that our services will be paid for in a timely manner. We offer multiple online payment options for our services – Debit, Credit, and E-Check. Just click the "Pay Online" button on the homepage of our website. Checks are also accepted.

