

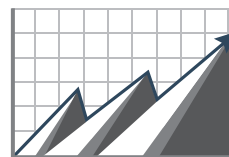
ONBOARDING Guidelines



ScherGroup

Certified Public Accountants & Advisors

ScherCPA.com





WELCOME to Scher Group

Alan K. Scher, MS, CPA/PFS, CTC, AEP®



“Scher Group is a professional CPA firm that is always available to address my personal and business tax needs as well as my accounting questions. They have provided me with significant savings on my taxes for both myself and my business. Having Scher Group is like have an in-house accounting department for my business.”

- Dr. Stephen Schmitz
The Brain and Behavior Clinic
Boulder, CO



Congratulations on your decision to work with us! On behalf of the Scher Group team, I would like to take this opportunity to welcome you as a new client and **express our sincere thanks for the opportunity to serve you.**

Our dedication to excellence, creativity, and commitment to all client relationships are your assurances that you are in good hands.

We pride ourselves on offering our clients responsive, proactive, and high value services. One way that we strive to provide excellent service is through constant communication.

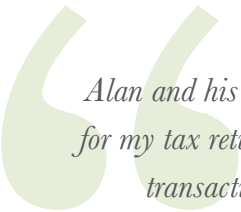
On the next few pages, you will find some important information, requests, and guidelines to ensure we have an efficient and effective working relationship for years to come!

Congratulations again for entrusting Scher Group with your tax, accounting, and advisory needs. We are pleased to serve you.



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Alan and his team have been my accountants for my tax returns and complicated real estate transactions for over 15 years. They are hardworking, dedicated, and very knowledgeable concerning tax laws and tax law changes. Their proactive advice has saved me tens of thousands of dollars in taxes.”

- Thomas Widawski, CCIM
Verus Commercial
Estes Park, CO

Scher Group, PLLC

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ScherCPA.com

Our MISSION:

To help our clients develop their businesses and grow their personal wealth through exceptional tax, accounting, and financial services.



Core VALUES:

Our Core Values are **REAL**

Respect: Mutual Respect for Others, our Environment, and the Planet

Ethics: Do the Right Thing – Always Be Open and Honest

Ability: Excellence in All We Do

Learn: Commitment to Personal Growth and Development

Our Competitive ADVANTAGES

- Highly Efficient
- World-Class Productivity
- High-Speed Processing
- Up-To-The Minute Accuracy
- Highest Levels of Security
- Increased Communication

We Employ Layers of Technological Resources to Propel Our Clients To Efficiency & Success



VIP Immediate EMERGENCY Access to your Scher Group Advisor

Contact us via a specialized procedure we provide only to VIPs!

Cloud-Based Portal Communication Tool

Our Liscio platform permits 24/7/365 immediate & auto-encrypted access to all tasks, documents, files, and communication with email and text notification. Your data is always available and retrievable from any location.

Screencast Communication Program

No more misinterpreting (voice mail messages, lengthy email explanations, snail mail communication) what we ask or share with you regarding any of your documents! You will SEE AND HEAR US all while following a pointer on your screen that is overlaid on the documents. A time-saver for everyone.

Online Meetings

Our firm places a HIGH VALUE on your time. With any PC or mobile device, you can see, hear, and conference with us in real time.

Email is a Secondary Notification Tool

How many unwanted emails do you plow through daily? Our technology notifies you directly and immediately and uses an importance scale to alert you to what needs to be read now or reacted to later.

Video Communication Platform

We utilize the latest in technology and send you videos so you can SEE AND HEAR US on your PC, cell phone, or other mobile device. Information is delivered verbally and visually, allowing you to follow along and understand the message. Effective communication is a key factor in the success of your business.

24/7 Delivery / Pickup / Scanning Service

No matter where you are in the world, we provide you with delivery, pickup, and scan of any paperwork that cannot be transferred electronically.





Expectations & DEADLINES

DEADLINES: We Are a Deadline-Intensive Company Because of Our **Fiduciary Responsibilities!** We take our fiduciary responsibility seriously and have a duty to act, with the highest degree of honesty and loyalty, in the best interests of our clients. We emphasize deadlines because of our fiduciary responsibility to prepare and submit complete and accurate tax filings to help you avoid IRS litigation, penalties, etc.

To ensure deadline compliance we schedule **mutually agreed upon deadlines** with our clients and propagate these deadlines via calendar invites, messages, and tasks. These invites, messages, and tasks ensure that our clients know and acknowledge the deadlines. We generally require that complete and accurate information is received by us no later than 30 days prior to a filing due date.

We appreciate your attention to these very significant matters as we fulfill our fiduciary responsibility to you and the tax authorities.

IMPLEMENT OUR ADVICE: Implement our strategies NOW! You will often get detailed strategy communications from us. React fast and implement! You must follow our advice for it to become an investment. If you don't it will become an expense.

COMMUNICATE YOUR NEEDS: If you have a challenge let us know via a communication protocol.

IMPORTANT DEADLINES:

January 15: 4th Quarter Estimated Tax Payments Due

January 31: Payroll Tax & 1099 Forms Due

March 15: Pass-through (S Corporations, Partnerships) Tax Returns Due

April 15: 1st Quarter Estimated Tax Payments Due

June 15: 2nd Quarter Estimated Tax Payments Due

September 15: 3rd Quarter Estimated Tax Payments Due

September 30: Extended Trust Tax Returns Due

October 15: Extended 1040 Individual and some C Corporation Tax Returns Due

November & December: Year-End Tax Planning & Payroll Adjustments

COMMUNICATION & Collaboration

Efficient and secure communication keeps our standards high and our operations running smoothly and effectively. In providing top-notch security and rigorous internal control maintenance, we maintain your confidentiality to the best of our ability. Always be apprehensive when opening emails. It is your obligation to keep access to our portals and your passwords confidential. Avoid answering any personal questions about yourself via email. We will never request personal information from you via email. If you feel like something is off, you are welcome to reach out to us and verify our identity.



Liscio Communication and Collaboration Software:



- All Clients Stay Secure Using Our Liscio Portal: scher.liscio.me
- Add the App to Your Smart Phone
- Upload Docs Securely to the Portal, Go Paperless and Cloud-Based so You Can Access Anytime, Anywhere.
- Client Help Link: <https://support.liscio.me/portal/en/kb/liscio>

Our APPS:



Paperless REQUEST

We are very conscious of our environmental impact and strive to reduce it as much as possible by being a paperless firm. Please support us by submitting all of your information electronically!

Prioritized COMMUNICATION

Communication is a critical part of the high quality of our work. In an age of information overload, our staff diligently adheres to an internal priority system. Our system ensures you WILL get the answers you need in a timely fashion. Not all things are a "quick answer," especially in the tax world. However, we will respond to you, acknowledge your question or request, and give you feedback on our solution and timeline. Your time is valuable, and this system helps ensure that your emergent matters get addressed as soon as possible, while less urgent requests will be handled at the next available moment.

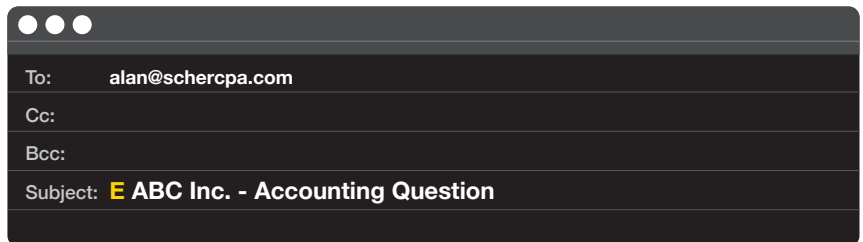


PRIORITY CODES:

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EMERGENCY

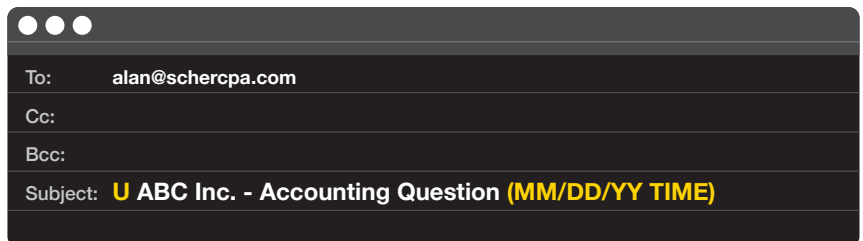
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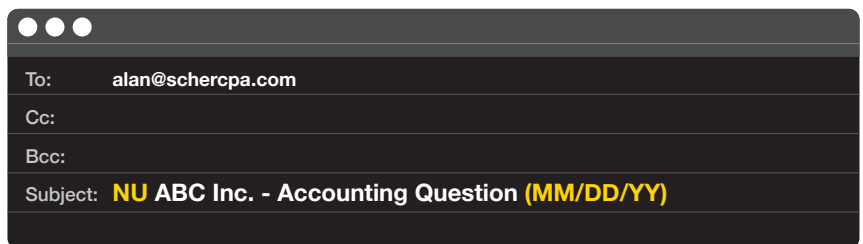
24 HOUR DEADLINE



NU

NON-URGENT

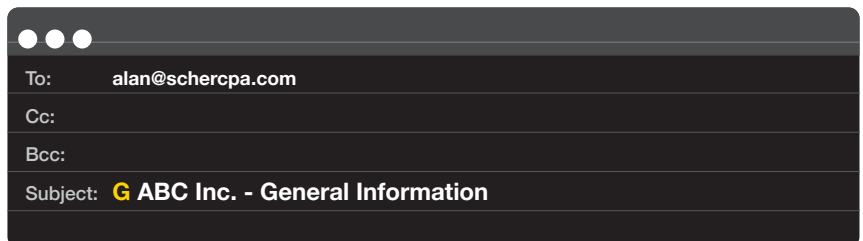
PROVIDE DUE DATE



G

GENERAL

NO RESPONSE REQUIRED



Our TEAM



Alan K. Scher, MS, CPA/PFS, CTC, AEP®
Owner

- Client Relations
- High Level Tax and Planning Strategies
- Strategic Decisions / Referrals

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(720) 893-7167



Amy K. Lund, CPA
Accounting Services Manager

- Accounting and Financial Statement Questions
- Quickbooks and Xero Questions
- Accounting System Design

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Katy M. Wieting, QBO Certified Proadvisor
Accounting Specialist

- Day-to-Day Accounting Needs
- Bookkeeping
- Quickbooks and Xero Questions

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Lorin B. Dytell, CFA, JD, LLM-Tax
Tax Manager

- Business and Individual Tax Preparation
- Business and Personal Tax Planning
- Tax Entity Structuring

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Becky E. Sawatzky, CPA
Tax Manager

- Individual Tax Preparation and Planning
- Business Tax Preparation and Planning
- Trust Tax Preparation

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Audrey L. Oberlin, MS-Accounting, MBA, CPA
Tax Senior

- Individual Tax Preparation and Planning

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Kelly L. Lundquist, NP
Office Manager

- Notary Services
- Portal Issues and Client Billing
- Document Requests
- Scheduling and Administration

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**We appreciate your referrals!
Who do you know
that can use our services?**