



## Important Updates from Mission Oaks Tax & Accounting

We're excited to announce that Mission Oak Tax & Accounting has recently merged with another firm, allowing us to streamline our operations and provide our clients with an even higher level of service.

### Introducing a More Efficient Digital Experience

To improve communication and collaboration, we're implementing a new all-in-one platform called TaxDome. This secure platform will be used for:

- **Proposals & E-Signatures:** Easily review and sign proposals and agreements electronically.
- **Payments:** Make secure payments directly through TaxDome.
- **Work Status Updates:** Stay informed on the progress of your tax return or other services.
- **Document Storage:** Access important documents like past returns and receipts anytime, anywhere.
- **Client Communication:** Send and receive emails, texts, and instant messages directly through TaxDome.

### Benefits for Our Clients:

This digital shift will save us significant administrative time, allowing us to:

- **Focus on Our Clients' Goals:** Dedicate more resources to understanding each client's unique needs and tax planning strategies.
- **Deliver Quality Work:** Provide our clients with the exceptional service they deserve.
- **Increased Efficiency:** Offer a faster and more convenient way to manage their tax needs.

### Next Steps:

- We anticipate our TaxDome platform to be fully operational by December 1st, 2024. Our clients will receive a separate email with instructions on how to access their TaxDome account and begin uploading their documents to their secure client portal.
- Engagement letters to current and new clients outlining the new fee structure will follow shortly.

### We Understand Change Takes Time

We appreciate our clients' understanding as we implement these changes. We believe this digital transformation will significantly enhance user experience and will allow us to offer an even higher quality of service than that for which we are already well known.

Sincerely,

The Mission Oak Tax & Accounting Team