

Virtual Model Announcement Template

Dear [Client name],

We are making some simple changes this year that will help us serve you better, please take a moment to review them in full below.

1. Tax Time is Now Easier!

- To make preparing your return easier for you, we are offering a new **Virtual Success Program.**

Here is how the program works:

- A. Instead of setting a tax appointment you will send in or drop off your tax documents and we will process your return internally.
 - B. If we have questions or need additional information, we will collaborate with you via phone or email.
 - C. Once we complete your return, we will contact you, send it to you electronically to review, or you can come to collect it from our office.
 - D. Once you have reviewed your return and submitted payment via credit card or check, we will file it and your tax process will be complete.
- ***There are three ways you can send us your documents:***
 - Email them to us at [Insert Secure Email Address]
 - Upload them to our secure portal via our website [Web Address]
 - Mail them in the envelope that we have provided [Physical Address]

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- **Why are we offering this new process?**

Tax law will continue to evolve, so this new process will allow us the time we need to make sure we are maximizing your tax savings and getting you the best possible outcome for your return.

By utilizing technology, we can provide the same great service but without the need for you to spend time traveling to and from our office. Many of our clients are already enjoying this streamlined process!

2. (Optional) **Easier Way to Book Your Appointment**

- If you do need an appointment, you can now schedule the date and time for your tax appointment online!
- Instead of [insert old way], you can go to our online calendar and pick any available time slot that works for you.
- On [Insert Date], we will be emailing you the calendar link, so watch your email!

We look forward to making this tax season your best one ever. If you have any questions, please feel free to contact us [insert contact info]

[Your name]