

Introduction

Preparing an accurate and timely tax return depends on me obtaining all your tax documents and information. Filling out the questionnaire via TaxDome and providing all applicable documentation will enable me to prepare your tax return. Thank you for the opportunity to serve you.

Tax Preparation Process

Tax preparation can be an intimidating process. Here is an overview of what to expect.

Tax Document Collection:

- You complete the online questionnaire and submit your tax documents electronically or we arrange for a physical drop-off.
- The returned questionnaire and tax documents are reviewed for obvious missing information or items; I will contact you if necessary.

Tax Preparation:

- I will prepare your tax return(s) in 20 or fewer days.
- I will contact you if I have any questions or need any clarifications.

Tax Return Review & Filing:

- Once your tax return(s) are ready for review, I will upload a PDF copy via TaxDome. Hard copy is available for additional charge. Your final invoice will be provided at this time, and your return will become immediately visible upon payment.
- If you have questions or comments, you can send an email, or we can schedule an appointment. I want you to understand your tax return and feel comfortable with the information being filed. I am happy to schedule a tax return review.
- I will e-file your tax return(s).
- Upon acceptance, I'll upload a screenshot confirmation to TaxDome.
- About 2-4 weeks (sometimes sooner, sometimes longer) after receiving acceptance notifications, refunds (if applicable) are directly deposited into your account.
- If a balance is owed, the default payment date will be the tax filing deadline.
- Hope to see you next year. I really appreciate your business!

Sending Your Documents

Once you have assembled all applicable tax documents and completed the online questionnaire, please choose one of the following options to deliver your documents:

Electronic – You will upload to TaxDome. This is my preferred method of receiving your documents and access to TaxDome is included as part of my service.

Physical – While I prefer you to provide your documents electronically, you may also bring your physical documents to me upon request.