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 via TaxDome.
- 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. 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, message me through TaxDome, 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!

TaxDome Overview

TaxDome is a software solution that will help ease communication between us. All clients are required to use TaxDome for the following reasons:

- The portal is SOC 2 certified, ensuring the highest level of security for your data, and supports two-factor authentication (2FA), exceeding IRS security requirements
- The interface is user-friendly even to those who aren't tech savvy.
- Everything in one place: you can electronically sign documents, settle invoices, complete organizers, sign proposals without going to multiple websites all from the comfort of your mobile phone or computer.
- Secure exchange of information & safety of your personal data. TaxDome has a built-in secure messaging system, where I can request information needed from you or chat in real time.
- The client portal is mobile-friendly, so you can access it anytime, anywhere.