

5 EASY STEPS TO YOUR TAX PREPARATION

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1

Review Our Tax Season Packet

- Contains business and personal checklists and your step-by-step homework items.
- If you haven't already, please sign your Engagement letter (sent as an electronic e-signature document).

2

Send Your Tax Documents and Payment

- Remit a payment option as selected in your signed Engagement Letter.
- Upload your documents to our secure online portal.
- You can also drop them in the mail or in person. Sorry, carrier pigeon and Pony Express are no longer accepted.

3

Follow-Up Information Needed to Finish

- We'll email you with a list of missing items or requests for clarification.
- Please reply promptly to avoid costly delays!
- Information received after April 1 may put your returns on extension.

4

Review and Sign

- You receive an email to pick a day and time for review.
- We can meet in the office, on a screen-sharing phone call, or do a recorded interview.

5

Returns are Filed

- Quickly sign your e-file authorization forms.
- We will send confirmation of accepted return(s).
- If you are a tax strategy client, next year's Engagement Letter will arrive in June and we will begin your planning for the coming year.