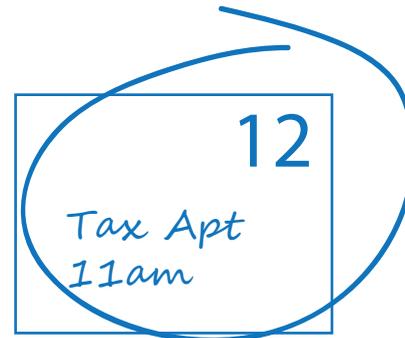
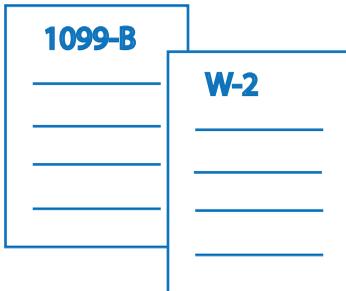


What you need to do:

A brief explanation of the preparation process.

We do our best to make filing your taxes as simple as possible, but there are still some very important things that you will need to do.



Gather information

The organizer is a very useful tool for gathering the tax information needed for us to prepare your return. Make sure you fill out the questionnaire and engagement letter.

Bring in your information

For new clients, you can schedule a video or phone call to go over your documents. For existing clients, we will contact you during preparation or we can schedule an appointment to go over the final return.

Online Account

Username

Password

Set up an online account

This is an important service we offer for your security and convenience. The online account is where you can securely upload additional information for your preparer and where your finished returns will be uploaded for you to view. We'll do all the technical work, but we need your help with the password.



Review

When your return is finished we will go over the results with you. If you need to pay any taxes we will have everything ready for you to send in the check or pay Online.

x *Your Signature*

Sign and Pay

Your return will be filed electronically, but you will need to sign a form 8879 and pay us for our services before we can file your return.