

# Tax Return Preparation Process



## **Submission of Information**

You have the following options for submitting your information:

### **1) Dropping your tax documents and information off at our office.**

We do ask that you make an appointment for a tax drop off. This allows us to be available to look over things to make sure nothing is missing. You can schedule this appointment using this link <https://reliablecounts.as.me/taxdropoff> or calling our office.

### **2) Upload tax documents and information to a secure tax portal.**

If you use the secure tax portal, you can upload documents as you receive them, but preparation of a tax return will not start until you mark that all documents have been uploaded. The link to the tax portal is <https://reliablecounts.taxdome.com/login>

After you have marked your documents are done being uploaded we will send you a confirmation email that we acknowledge that you have completed uploading your documents to start the tax preparation process. If you do not receive this email within 24 hours of marking your documents complete, please follow up with us.

If you need a checklist to know what items are needed for tax preparation, please see the “Tax Forms” section on this website under client links. If still unsure what is needed, please contact us.

You will receive emails throughout the tax preparation process so you can be informed of the status of your tax return. Please be on the lookout for these.

We make no guarantee of having your tax return filed before the tax deadline, so the sooner we have your complete tax information, the more likely we are to have it ready on time. Generally, our cutoff time is March 1<sup>st</sup> for business tax returns, and April 1<sup>st</sup> for personal tax returns. Extensions may be filed if the circumstances require.

## **Preparation of Tax Return**

Once we have your complete tax information, a draft of your tax return is usually ready within about one week, and the whole process is finished within about two weeks. Returns are always prepared on a first-come, first-served basis. During busy periods an extension may need to be filed, and the process can take longer, perhaps 2 to 4 weeks. Occasionally, but not often, we misclassify the status of a client's tax return on our end. So, if you have not heard from us for more than 10 days after we have acknowledged receipt of your information, please contact us.



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## Resolving Open Items

If we need additional information or clarifications, we will contact you by email or phone with any open items. We ask that you respond within a week and answer all questions concisely. If needed, a phone call can be arranged to discuss an issue, although our time is limited during tax season. Please note that long, unexpected delays in getting back to us could increase your fee if they cause us to have to re-review your information.

We will acknowledge email communication, generally within 48 to 72 hours (sometimes longer over weekends), so if you don't hear back from us, please resend your email.

We will use our judgment in resolving questions where the tax law is unclear, or where there may be conflicts between the taxing authorities' interpretations of the law and other supportable positions. We will perform reasonable research to support positions taken in your income tax returns. Unless otherwise instructed by you, we will resolve such questions in your favor, whenever possible. Tax rules change constantly and any opinion expressed in connection with a transaction at one time may not apply to the same or to a similar transaction at a later date. You should let us take a fresh look each time a transaction of a material nature is proposed.

## Fee Payment

When your tax returns are complete based on the information provided, we will send you a "return ready" email which will state the expected amount of any refund or tax due, the tax preparation fee, and a link to make a payment and to schedule a "return review" appointment. Payment should be made within a week of receiving this email.

If you have a question about the fee, please let us know and we will provide a calculation.

If you have concerns about the results (refund or tax due), rest assured there will be ample time and opportunity to address and resolve them during the review process. Please reserve your questions until you have the return in hand and have had a chance to look it over. Having it to refer to will make it possible for us to explain things more easily and you will also be able to see more clearly what is going on in your tax situation. Always keep in mind that your return is never final until you have given your signature authorization on the e-file forms or the tax return itself, so changes can still be made if need be.

For more information, please refer to the fees page on this website.

## Tax Return Review & Filing

It is essential that you look them over carefully since you have legal responsibility for their accuracy. If you discover any errors or omissions made by us, we will correct them. If you discover any errors or omissions made by you, we will correct those as well, however additional fees may apply, based on time.

The tax preparation fee includes 30 minutes of review time – either in person or over zoom. Reviewing the draft carefully and confirming that the information is correct is very important to us and makes sure you have an accurate return. The review also gives you the opportunity to ask questions and helps you understand the



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numbers on the return before being submitted for e-file. It also gives us the opportunity to offer advice on your tax situation and help you plan for the current year's taxes or upcoming life events.

Once you are satisfied that your tax returns are accurate, they are ready to be filed. If your tax return is being filed electronically, you will sign and date the e-file authorization form(s) which will be contained in the tax return file. *Please do not send us the signed authorization forms if there are any outstanding issues.* Do not assume that your forms have been e-filed unless you receive an email from us confirming it has been done. If your tax return is not eligible for electronic filing, we will email you instructions to print, sign and mail your tax return to a taxing authority.

We recommend using our services every year, not only in more complicated years. Many items carry over from year to year, and we can provide you better service if there are no gaps in our exposure to your files. Also, there is a greater chance of error, especially if the return for the year we haven't prepared has been done improperly.

*Urgent work:* While we will always provide service as quickly as we can, we cannot promise instant or express work. If something is important, please give us advance notice.

*Priority service is not available:* We always do work on a first-come, first-served basis, even during busy periods. In fairness to our other clients, we don't offer preferential service for an additional fee.