

TAX PREP PROCESS

STAGE
1

Information & Document Intake

STEP 1

Complete your tax questionnaire and upload docs to our portal

If needed, alternative arrangements can be made for submitting documents

STEP 2

E-sign your engagement letter and provide a payment method

*It's important to note the completion of Step 2 initiates the **START** of the 2-5 week turnaround time for preparing the return*

STAGE
2

Tax Return Preparation & Review

STEP 3

We prepare and review your return within a 2-5 week window

We will reach out if we have any additional document requests or questions during this time

STAGE
3

Finalization & E-Filing

STEP 4

Review and discuss your tax return with us

STEP 5

E-sign your 8879 form to approve finalization and e-filing

STEP 6

We e-file your Federal and State return(s)

STEP 7

Complete any tax payments and/or local filing by their designated due dates

****This step is very time-sensitive****

STEP 8

We provide your e-file confirmation letter and the process is complete