It's that time of year again...TAX SEASON!

We know this can be a stressful process, we are here to provide you with the expertise and service you need and deserve. Please begin to gather all your tax forms and required documents for us to properly file your taxes. You can upload your documents as you receive them, no need to wait. (If you're unsure what you need, we have put together this handy 1040 checklist for you here: ***Tax Document Checklist.***

To complete the organizer *REQUIRED*

- Click on "More" and select "Organizers"
- Click "Complete organizer"
- All clients must complete an organizer each year

To sign the engagement letter *REQUIRED*

- Click on "More" and select "Proposals & Engagement letters"
- Click on "Sign proposal"
- All clients must complete an engagement letter each year

Notify us when you are done. *REPLY NEEDED*

- When you have uploaded all documents, completed the organizer, and signed the engagement letter notify us by reply to this chat so **we know you are done and we can start reviewing your documents.**
- If you are waiting for a few documents let us know what you are waiting for; generally, we can still get the preparation started.

Document submission deadlines: *DON'T BE LATE, SOME VERY IMPORTANT DATES*

- To complete your personal return by the due date we must have all (most) documents by **March 8th**. To complete the return by the **extended due date of October 15th** we must have everything by **August 15th.**
- To complete your business return (1065, 1120 or 1120S) by the due date we must have ALL information and documents by **February 2nd.** To ensure completion by the **extended due date of September 15th** we must have everything by **July 31st**.
- Extensions are due March 15th (business returns) and April 15th (personal returns). **An extension gives you additional time to file your return it DOES NOT extended the time to pay a balance owed to the IRS.**

Office processes and procedures: *THINGS TO KNOW*

- I want to share a couple of important reminders regarding our office processes and procedures.
- **Security** - Keeping your information secure is our top priority. To maintain the highest level of security and efficiency, we utilize a secure project management system, Tax Dome, to serve as your client portal and keep all our communication in one place. Please submit all documents and communication via Tax Dome or drop off at the office. We **CAN NOT** accept documents via email, text, or the various social media platforms.
- **Appointments -** An appointment IS NOT required or necessary. Documents can be uploaded or dropped off at the office anytime using the mail slot in the door. If you need to come into the office, message or call to confirm someone will be in the office when you plan to comeby.
- **Need to talk to someone?** - If at any time you feel you need to speak with Theresa or Tara, you always have the option to request or schedule an appointment or call. Messaging via Tax Dome is the preferred and most efficient communication. Send a detailed message indicating your concerns and availability for a call, the more details the better so we can plan accordingly. We will respond the current or next business day (remember the office is closed on weekends and Mondays).
- **Fees for services** - The fee is determined once we have all material documents and information needed to prepare the tax return. **We generally require a non-refundable 50% deposit prior to the start of any work**. The remaining amount is due when a draft of your return is provided and prior to the e-filing of your income tax return.

Are you ready to get started?