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Below is the process for tax return processing for the 2019 tax return preparations.

If you will be coming into the office for an appointment:

- Call to make an appointment OR use the CONTACT US link and request we get with you.
- If requested, we can send you a Tax Organizer (via mail, encrypted email, or our secure Portal).
- We will meet, and if possible, finish the return while you are there. If there is missing data, then we will obviously wait until it is available before finalizing the return.
- After you have reviewed the return and are comfortable with, and have paid for our service, the return will be efiled. We will keep a copy of it on the Portal for you, and we will print a hard copy for you to take home if you like.
- If you must retrieve data before we can finish, then the process of review and payment can happen at a second meeting or can be done through Portal communication.

If you will be sending dropping off, mailing, or sending via the Portal:

- Request a Tax Organizer if you would like one. This can be done through a phone call or email. We will upload it to your Portal so you can retrieve it securely. We ask you return it the same way as it is much safer than regular email. However, we can password protect an email if you prefer to have it sent that way. If you do not have access to the internet, we will mail it to you. We will also send you an Engagement Letter if you have not retrieved one from the Website.
- Either fill out the Organizer or gather your data in the way you are most comfortable. Upload that information to the Portal if possible, if not, please mail it to the address above. Please make sure your Tax Engagement Letter is sent or dropped off as well.
- We will process the return and request any missing information – either by email or phone call. Once we finalize the return, we will upload a copy marked "**draft copy, not finalized."** This will help make certain you know which copy is the final.
- We will request payment **BEFORE** eFiling the returns.
- We also must have your eFile Authorzations on file **BEFORE** eFiling, per the IRS and our insurance carrier. This year we have added a feature allowing you to sign the authorization electronically.
- The returns will then be eFiled and verification of such will be emailed to you.
- An "AS FILED" copy will be uploaded to the Portal and stored there.

Regards,

A.L. Smith, CPA