

Top 5 Tips for a Successful Tax Prep Process

1. Review Last Year's Documents

Review your documents from the previous year. Ensure that you provide all the same information again this year and make note of any documents that are no longer relevant.

2. Submit All Information at Once

Avoid sending your tax documents one piece at a time. Wait until you've gathered all your tax documents and submit everything at one time to prevent delays.

3. Skip the Staples

Do not staple your paperwork or use a paper crimper. This complicates scanning and organizing your documents, so they should be kept loose.

4. Remove from Envelopes

Remove all documents from their original envelopes before dropping them off. Many companies are no longer mailing your documents, instead they are posting them online. So, it's necessary for you to confirm your documents are actually inside the envelope. This assists us to be more efficient when preparing your tax return.

5. Consolidate Responses

If we ask multiple questions via email after receiving your documents, please gather all necessary information and respond by replying to our email to keep all responses together in one email chain. Be sure to answer all questions, and if you don't understand any of them, don't hesitate to ask for clarification. This helps to streamline communication and reduces the time it takes going back-and-forth.

If we send you a list of documents that are missing from your drop off envelope, submit all necessary documents at the same time. We won't start preparing your tax return until we receive **all** items on the list.

Thank you for your cooperation!

Carolann & Cathy