Tax Return Process at Tax Goddess Business Services, PC

- Businesses
  - Step 1: What you receive to 'start' the process
    - If you are a new client
      - Please email us for your New Client Packet to get this process started :)
    - Receive your Business Organizer, Checklist, and Engagement letter
      - Fill out the following:
        - Checklist
        - Organizer
          - Answer any questions asked of you for your type of business, make sure you check which section(s) are appropriate for you.
        - Engagement Letter
          - Initial at the bottom of each page, and put the appropriate signatures at the end.
          - Remember to sign if you want the Peace of Mind Guarantee!
  - Step 2: What you will need to turn in to Tax Goddess Business Services, PC
    - checklist
    - organizer page questions/answers
    - engagement letter
    - QB file - preferably in the format of a QBX accountants copy
      - upload this to your SmartVault folder - please email us to let us know it is there.
    - Your retainer payment will be processed
  - Step 3: Preparation & Review Process
    - Preparation Process
      - Your return and information will be prepared and put into the tax return preparation queue.
      - You may be contacted by one of our tax preparers with additional questions they have
      - Your return will be moved to Review once we believe we have all the information and no additional questions.
    - Review Process
      - Your return will be reviewed by your CPA
      - You may receive a phone call or email with any additional questions your CPA may have for you.
      - If no other questions, you will receive a phone call to let you know the results of your return and what the next steps are.
    - Your return will then be given to the administrative team to assembly and prepare for your signature.
  - Step 4: Finalizing your Returns
    - The administrative team will be in contact with you to let you know when the returns are ready for signatures.
    - You should arrange a method to sign your tax returns, and mail them if necessary, with the adminsitrative team.
    - Final payment for the return will be taken at the time of signature.
    - Receiving your final documents
      - Mail any returns necessary to their appropriate addresses, as instructed by the adminstrative team. Please send them certified return receipt.
      - Client copies of your returns will be uploaded to your folder online at SmartVault.com
- Individuals
  - Step 1: Starting the Process
    - If you are a new client
      - Please email us for your New Client Packet to get this process started :)
    - Receive your Individual Organizer, Checklist, and Engagement letter
      - Fill out the following:
        - Checklist
          - Please make sure that you provide a response to ALL the questions, even if the answer is N/A
        - Organizer
          - Depending on if this is your first year as our client you will receive either:
            - Tax Goddess Business Services prepared your return last year: a pre-filled organizer
              - a pre-filled organizer only prints pages to reflect items that you had last year. If you have a new business, new rental property, new children, new anything please attach statement(s) reflecting any appropriate information you think we may need for these new items.
            - This is your first year with Tax Goddess Business Services, PC: you will receive a blank organizer
              - The blank organizer is well over 100 pages. Don't Panic! The 100 pages have every possible type of tax issue that you may have as an individual. Many of them will not apply to you. Please draw a line through any page that does not apply to you. Please use the rest of the organizer as a way to trigger you on what information you should be providing to us.
                - If you have any questions, please ask us!
            - NOTE TO ALL CLIENTS *New and Current*: You do NOT need to fill in every page in the organizer. It is called an organizer for a reason.
              - Pages that we DO want you to fill out
                - The personal information pages: name, birthdays, addresses, childrens info, etc. This helps us keep up to date with your most current information every year.
                - The questions pages: A yes answer to any of these help trigger us on additional questions we make want to ask you to help lower your tax burden.
              - Other Pages: you can use these as an "organizer" for your documents (meaning, if it says w-2, please put copies of your W-2 forms behind the w-2 page)
        - Engagement Letter
          - Initial at the bottom of each page, and put the appropriate signatures at the end.
          - Remember to choose if you want our Peace of Mind Guarantee!
  - Step 2: What you need to turn in to Tax Goddess Business Services, PC
    - checklist
    - organizer page questions/answers
      - remember to attach your copies / original tax documents to your organizer for us!
    - engagement letter
    - If you have a business
      - QB file - preferably in the format of a QBX accountants copy
        - upload this to your SmartVault folder - please email us to let us know it is there.
      - If you use some other sort of accounting system, please get in contact with our offices to determine the best way to get us your information
    - Your retainer payment will be processed
  - Step 3: The Preparation & Review Process
    - Preparation Process
      - Your return and information will be prepared and put into the tax return preparation queue.
      - You may be contacted by one of our tax preparers with additional questions they have
      - Your return will be moved to Review once we believe we have all the information and no additional questions.
    - Review Process
      - Your return will be reviewed by your CPA
      - You may receive a phone call or email with any additional questions your CPA may have for you.
      - If no other questions, you will receive a phone call to let you know the results of your return and what the next steps are.
    - Your return will then be given to the administrative team to assembly and prepare for your signature.
  - Step 4: Finalizing your Returns
    - Assembly and Signing of your returns
      - The administrative team will be in contact with you to let you know when the returns are ready for signatures.
      - You should arrange a method to sign your tax returns, and mail them if necessary, with the adminsitrative team.
      - Final payment for the return will be taken at the time of signature.
    - Receiving & Mailing your final documents
      - Mail any returns necessary to their appropriate addresses, as instructed by the adminstrative team. Please send them certified return receipt.
      - Client copies of your returns will be uploaded to your folder online at SmartVault.com