

TAX RETURN PREPARATION REFERENCE GUIDE

DEADLINES

- **March 18th, 2024: Completed 2023 Tax Package, along with all your tax documents in our office.**
If we have not received all your information by this date, you may be subject to additional fees and an extension may need to be filed. The sooner we get your information, the better job we can do for you.
- **April 15th, 2024: Tax Return Filing and Payment Deadline.**

5 Step Tax Return Process:

Step 1: Submit your completed tax package and all tax documents to us via these methods:

- Your client portal- **MAX OF 3 PDF FILES** (unlimited pages within a pdf), no zip files or pictures accepted.
- Drop off via drop slot in main door or larger drop bin next to main door, or in office.
- Mail in

Step 2: Once your return is ready, you will be notified by your preferred contact method indicated on the tax package you submitted.

Step 3: Review your tax return for accuracy. *If any changes need to be made, please stop here and reach out to your preparer.*

Step 4: Pay the tax return preparation fee.

Step 5: Sign and return Form 8879 (E-File Authorization Form). *We will provide you with this form.* It will need to be signed by both you and your spouse, if applicable and returned to our office.

Once all of the above have been completed, we will E-file your tax return with the IRS.

We will never e-file your tax return unless we receive your signed Form 8879.

Thank you for your trust and confidence in our services, we value your continued patronage. We are looking forward to a great tax season! Like us on Facebook and check out our website to see tax tips and information updates.

HELFPUL LINKS:

- Our website resources tool to help you gather your tax documents www.hh-cpas.com
- Your portal for transmitting documents back and forth
<https://www.officetoolsportal.com/portal/login/>

KEEP FOR YOUR REFERENCE