



Tax Preparation Process... What's Next

Our Tax Preparation is a Process. More than 1 person will be working on your return.

- All documents are scanned into your file
- A Tax Preparer will initially prepare your return based on the information submitted
- Then a Tax Reviewer will look over the return for any missed items and to ensure all deductions have been considered
- Finally, Paul Dion will perform a final review.
- Once your return has been finalized, a copy will be uploaded to the portal. All clients are asked to look over the return before signing, paying extra attention to the following:
 - Names (ensure correct spelling)
 - Address (an incorrect address can mean delaying your refund!)
 - Dependents (if a dependent is already claimed by himself or another, your return filing will be rejected by the IRS)
 - Bank information (if opting for direct deposit/direct debit)
 - ✓ Our process is in place to reduce errors on the return based on the information given to us. However, only you know if the information provided is accurate. For example, if you moved, some of your tax forms may list your old address or your employer may have misspelled your name on your W2.
- Once you have looked over your return and everything is correct to the best of your knowledge, please sign the e-file authorization forms included in your signature set (or e-sign on the portal – e-signature instructions will be e-mailed to you).
 - In sending us signed (or e-signed) authorization forms, you are stating under penalties of perjury that you reviewed your tax return and everything is accurate to the best of your knowledge.
- We will e-file your tax return once we receive your signature pages and your fee has been paid in full (your return may not be released until payment is received; invoice is on the portal)
 - You may pay online here: <http://smarttaxadvisor.com/pay-your-bill/>

We use the secure CLIENT PORTAL for all communication

- Go to our website (www.smarttaxadvisor.com) and click on “Client Portal”
 - Username: your e-mail address (only 1 can be used)
 - Password: one you created
 - ✓ If you forget your password, please click “forgot password.” Enter the SSN of the first person listed on the return to confirm your identity.
- Don't let scammers steal your identity from the e-mails you send us containing your Social Security Number! The Portal is for your Protection!
- Portal uses:
 - Send/Receive Documents
 - Send/Receive messages (including requests for missing/additional info)
 - Send/Receive Tax Returns (we DO NOT print tax returns—only for paper filing)
 - E-Sign documents
 - Send Reminders (Need Signature, Payment, Missing Info, Deadlines, etc)



Tax Preparation Process... What's Next

You may receive communication from our staff during the preparation process

- ❖ You may receive portal messages (or, on occasion, phone calls) from any of our tax professionals when they find information missing or need clarification.
- ❖ Our goal is to deliver an accurate, timely return with the most savings possible
- ❖ Most other practices do not have these checks and balances in place or put in the extra effort that we put into the preparation of your return.
- ❖ We know you should be thrilled to receive these communications because it shows we care enough about your return to get it done right & search for as many deductions as possible.
- ❖ You won't find most other firms with this level of service.

Helpful Tips Regarding Our Tax Preparation Process:

- Gather all of your tax information: Complete, organized paperwork means a faster turnaround time!
 - Note: if you are just waiting on one or two items, such as a K1, we can get started on your tax return and add in that piece later.
 - However, PLEASE DO NOT send us information piece-meal. Sending documents in sporadically throughout the year will delay the preparation of your return, and information may be inadvertently left off of the return.
- Deliver your Tax Documents to us one of the following ways:
 - Portal Upload (log in and select "Upload Documents")
 - Fax to 508-630-9008
 - Drop off at the front desk (Millbury location only; no appointment necessary for drop offs)
 - Mail to the Millbury Office (We do not accept mail at the Newport location):

Paul Dion CPA
22 West St. #6
Millbury, MA 01527