Our Tax Preparation is a Process

More than one person will be working on your return.

1. At tax time, gather together all of your tax forms, organizer, signed Engagement Agreement (EA) and any other information and upload all your tax data to your secure client portal.
    - *Please don't mix information -- if you have more than one tax return, the portals are linked – click the name at the top and upload the documents to the correct file.*
2. All documents are extracted from the portal and saved to your digital file (you will receive automatic confirmation once we've downloaded your documents), and your file is moved into process.
3. A Tax Preparer will initially prepare your return based on the information submitted. They may send you a Portal Message asking for more information. *Please reply on the portal.*
4. Once your return has been initially prepared, Paul Dion will review the return.
5. Once your return has been finalized, a copy will be uploaded to the portal along with e-file authorization signature pages and (if applicable) Estimates and payment vouchers.
   You must look over the return before signing.
    - Be sure to review your Refund/Amount Due and whether you are set up for direct deposit/debit or to send/receive a check.
    - NO CHANGES CAN BE MADE ONCE SIGNED AND FILED.
6. Once you have looked over your return and everything is correct to the best of your knowledge, please e-sign your Signature Set.
    - Trouble e-signing? You can always download your Signature Set, wet sign all pages requiring a signature (ie. Fed/State/Direct Deposit), then upload them to the portal as a workaround.
7. We will e-file your tax return once we receive your signature pages.

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
    - 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.
- DO NOT EMAIL sensitive information! The Portal is for your Protection!
- Portal uses:
    - Send/Receive Documents
    - Send/Receive Messages (including requests for missing info)
    - Send/Receive Tax Returns (we do not print tax returns)
    - E-Sign documents
    - 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 piecemeal. Sending in documents sporadically throughout the year or as they arrive will delay the preparation of your return, and information may be missed and inadvertently left off of the return.
    - Please do not mix information for different returns. If you file a separate business return (ie. S-Corp or Partnership), please upload the data to the correct account (click the name at the top of your portal to toggle between linked accounts).
    - The Tax Organizer is REQUIRED. Please fill out the organizer to the best of your ability, especially the yes/no questionnaire (you may skip the income sections for which you can provide the form, such as 1099s & W2s – we work from the form itself). This ensures accuracy and helps us find you the most deductions possible!
- Deliver your Tax Documents to us one of the following ways:
    - Portal Upload (log in and select "Upload Documents")
    - Fax to 508-306-9692 (we use a secure e-fax service)

NOTE: WE ARE VIRTUAL – any documents mailed or dropped off at our office may delay processing by at least one week. *Any documents sent to our office will be shredded* after scanning them into your file, so please do not send originals.