

Step 1- send us answers to the new client questions to see if we will be able to assist you (see questions below)

New clients - inquiring about our tax services we will need you to answer the following questions thru email or text

Question.1. Who referred you ? And what is your name ?

Question 2. Is this your first time filing ? And or did you file your 2021 return last year ?

Question .3. Did you receive a refund ? Or had to pay back the IRS ?

Question 4. Do you know your filing status? Single, or head of household (usually single with kids is considered head of household or do you file married filing jointly ?

Question 5. Do you and your dependents if any have valid socials or itins ?

question 6. Will you be ok with an electronic process meaning via uploading documents via secure link to your email and or text? Not in person.? We can do zoom if we have to

****If you have any questions for us please text or email them to us and we will respond in a timely fashion but only after we receive answers to the above questions.****

Please send us replies to this questions and provide us with your email if your interested in filing with us

Step 2- We will reach out to you via text or email and or call you to discuss how we can help you (please provide best way to reach you)

If this is your first time filing with us we encourage you to watch this video <https://youtu.be/DVVgmBytDRA> that goes over the filing process (we send you a list of what we need, you provide paperwork, we give you an estimated time or completion, we text you or email if we need anything else, we send for review to your email, if all good you can sign and we submit your return to the IRS in your behalf .

Our prep fee is based on forms used on your return so we don't quote upfront we must first get paperwork if you want an estimate it will most likely cost \$60 upfront which will go towards your prep fee if you file with us.

Step 3- we will send you a list of items to submit via secure link, email, text or drop off – drop off must make appt

Step 4- we will prepare return accordingly, & send for review

please note that we are at the busiest time and please expect a delay and this is why to save time we have created several videos to help expedite and answer your questions we encourage you to watch them* Thank you so much 😊

Step 5- Payment for our services will be either paid upfront, or taken from your refund and or credit card, paypal or zelle we do not take cash