Tax Time LLC

Roger D. Nickell, CPA, MBA

Income Tax Preparation Service

"The Simple and Complete Approach to getting your Taxes Done!"

Process Steps to Complete your Income Taxes

Step 1 **Tax Documents to Provide**	**Review Checklist** to ensure you have all your Tax Documents **Checklist:** https://taxescpa.com/resources/ (Note: Identification and Prior Year Tax Return needed for New Clients)
Step 2 **Information to Provide**	**Complete Tax Organizer**; Page 1 and 2 (Required) **Tax Organizer:** https://taxescpa.com/resources/ Depending on your version of software the document may be interactive for you to populate and save electronically (if you prefer) OR you can print and fill out. The best process to complete and retain input is to DOWNLOAD, Input Data, **Print**, and SAVE AS (with a file name to include your last name). The input and interactive option does work but, in some instances, there may be issues with the software version and saving- if this is the issue the most efficient way is to print and fill out.
Step 3 **Options to Provide Documents & Info.** **Drop Off** **Electronic** **Meeting**	**Provide Documents** to Tax Time LLC-Roger Nickell CPA ***(Select One Option)*** ➢ **Drop Off** Documents at our Office 1 Victory Drive, Suite 101, Liberty MO 64068 In Office Mail Slot in Wall by Office Entrance (Mon-Fri 7 AM – 6 PM) (Sat 8 AM – 12 PM) ➢ **Electronic** - Upload Documents to Secure Client Portal Secure Client Portal: https://taxescpa.com/portal/ (New Clients will Need to Request Access – E-Mail or Call Us) ➢ **Set Up a Meeting** (E-Mail: Roger@taxescpa.com Call: 816-305-5873)
Step 4 **Preparation** **Communication** **Results**	✓ Documents Reviewed and Client Contacted if additional information is needed ✓ Tax Return will be prepared ✓ Communication with Client regarding Tax Return and Results ✓ Client Review and Signatures
Step 5 **Tax Returns Filed**	Tax Return E-Filed for Federal, State(s) and any Local Jurisdictions