

Tax Time LLC

Roger D. Nickell, CPA, MBA

Income Tax Preparation Service

“The Simple and Complete Approach to getting your Taxes Done!”

Process Guide to Complete your Income Taxes

Step 1 Tax Documents to Provide	Review Checklist Document to ensure you have all your Tax Documents Checklist: 2021-Tax-Checklist-1.pdf (taxescpa.com) (Note: Identification and Prior Year Tax Return needed for New Clients)
Step 2 Information to Provide	Complete Tax Organizer: Required to ensure Current, Complete, and Accurate information. Tax Organizer: 2021-Individual-Taxpayer-Organizer-Tax-Time-LLC-Roger-D-Nickell-CPA.pdf (taxescpa.com) <i>Copies are also Available at our Office to Complete</i>
Step 3 Options to Provide Documents & Info. Drop Off Electronic Meeting	Provide Documents to Tax Time LLC-Roger Nickell CPA ➤ Drop Off Documents at our Office 1 Victory Drive, Suite 101, Liberty MO 64068 In Office (M-F 8:30 AM–12:30 PM; 1:30 PM–5 PM) <i>OR</i> By Appointment Mail Drop in Wall by Office Entrance (Mon-Fri 7 AM–6 PM) (Sat 8 AM–12 PM) ➤ Electronic Upload Documents to Secure Electronic Client Folder Electronic Client Folder: https://taxescpa.com/portal/ (New Clients will Need to Request Access – E-Mail or Call Us) ➤ Meeting (E-Mail: Roger@taxescpa.com Call: 816-305-5873)
Step 4 Preparation Communication Results Tax Returns Filed	<ul style="list-style-type: none">✓ Tax Return will be prepared✓ Communication with Client regarding Tax Return and Results✓ Copy of Tax Return provided to client (Electronic or Paper)✓ Client Review and Signatures✓ E-File Tax Returns for Federal, State(s) and any Local Jurisdictions

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