

## 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

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| <b>Step 1</b><br><br>Tax Documents to Provide  | <b>Review Checklist Document</b> to ensure you have all your Tax Documents<br><br>Checklist: <a href="#">2023 Tax Checklist (TaxesCPA.com)</a><br>(Note: Identification and Prior Year Tax Return needed for New Clients)   |
| <b>Step 2</b><br><br>Information to Provide  | <b>Complete Tax Organizer:</b><br><br><b>Required</b> to ensure Current, Complete, and Accurate Information. <b>Tax Organizer:</b> <a href="#">2023 Income Tax Organizer (TaxesCPA.com)</a> Copies are also Available at our Office to Complete   |
| <b>Step 3</b><br><br>Options to Provide Documents & Info.<br><br>Drop Off<br><br>Electronic<br><br>Meeting | <b>Provide Documents</b> to Tax Time LLC-Roger Nickell CPA<br><br>➤ <b>Drop Off</b> Documents at our Office<br>1 Victory Drive, Suite 101, Liberty MO 64068<br><b>In Office</b><br>(Mon - Fri 8:30 AM - 5 PM) <i>OR</i> By Appointment<br><b>Mail Drop</b> in Wall by Office Entrance<br>(Mon - Fri 7 AM–6 PM) (Sat 8 AM–12 PM)<br>➤ <b>Electronic</b> Upload Documents to Secure Electronic Client Folder (ECF)<br>Electronic Client Folder: <a href="#">Electronic Client Folder Log In</a><br>(New Clients will Need to Request Access – E-Mail or Call Us)<br>➤ <b>Meeting</b><br>(E-Mail: <a href="mailto:Admin@TaxesCPA.com">Admin@TaxesCPA.com</a> Call: 816-305-5873) |
| <b>Step 4</b><br><br>Preparation Communication Results<br><br>Tax Returns Filed                            | <ul style="list-style-type: none"><li>✓ Tax Return will be prepared</li><li>✓ Communication with Client regarding Tax Return and Results</li><li>✓ Copy of Tax Return provided to client (Electronic or Paper)</li><li>✓ Client Review and Signatures</li><li>✓ E-File Tax Returns for Federal, State(s) and any Local Jurisdictions</li></ul>  |

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