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:** [2024 Tax Checklist (TaxesCPA.com)] (Note: Identification and Prior Year Tax Return needed for New Clients)
Step 2 **Information to Provide**	**Complete Tax Organizer:** **<u>Required</u>** to ensure Current, Complete, and Accurate Information. **Tax Organizer:** 2024 Income Tax Organizer (TaxesCPA.com) *Copies are also Available at our Office to Complete*
Step 3 **Options to Provide Documents & Info.** **Drop Off** **Electronic** **Meeting**	**Provide Documents** to Tax Time LLC-Roger Nickell CPA ➢ **<u>Drop Off</u>** Documents at our Office 1 Victory Drive, Suite 101, Liberty MO 64068 ***In Office*** (Mon - Fri 8:30 AM - 5 PM) *<u>OR</u>* By Appointment ***Mail Drop*** in Wall by Office Entrance (Mon - Fri 7 AM–6 PM) (Sat 8 AM–12 PM) ➢ **<u>Electronic</u>** Upload Documents to Secure Electronic Client Folder (ECF) Electronic Client Folder: Electronic Client Folder Log In (New Clients will Need to Request Access – E-Mail or Call Us) ➢ **<u>Meeting</u>** (E-Mail: Admin@TaxesCPA.com Call: 816-305-5873)
Step 4 **Preparation** **Communication** **Results** **Tax Returns Filed**	✓ 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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