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## WHAT TO EXPECT NOW...

Thank you for allowing us to serve you. We will strive to exceed your expectations in every way.

This is an outline of what you should expect from this point forward. Keep it in a prominent place. Reference it with any questions you may have.

### **The password for any emails or uploads we send you will be:**

- **home zip code + last four of your social security number**

### **AFTER YOUR APPOINTMENT**

- Gather and bring in any missing information we requested from you promptly

### **DURING PREPARATION PROCESS**

- We may contact you with questions or need additional information. Please respond promptly.

### **AFTER PREPARATION IS COMPLETE**

- We will upload a copy of the returns to your secure portal for your review. After a successful review, print out only the following forms:
  - Federal Form 8879
  - SC Form 8453
  - NC (no requirements)
  - Other states vary, we will inform you
  - Both taxpayer and spouse should sign and date

### **BEFORE E-FILING**

- No appointment is needed
- Bring in your payment from our invoice
- Bring in the above listed signed forms
- You will receive from us your original documents
- We will file your returns electronically, both federal and states

### **AFTER E-FILING**

- IRS and state(s) will respond back, usually within 24 hours, to accept or reject the returns.
- If rejected, we will immediately contact you and resolve the matter.
- If accepted, we will upload to your secure portal Form 9325, the confirmation letter from IRS.
- If you are expecting a refund, this form will tell you the approximate date it will be directly deposited into your account. It will also give instructions on what to do if it is not received timely.