

## **Tax Preparation Services: How to Work With Us**

Welcome! Here are the steps to having your tax return prepared by our office. We also encourage you to read our Best Practices document for some suggestions on the best way to collaborate with your tax preparer and our firm.

### **Step 1: Initiate the process**

To begin, go to <https://schanelcpa.com/client-resources/> and complete the following:

*E-Sign an Engagement Letter:* To electronically sign your engagement letter for tax preparation services, go to the Engagement Letter section of the Client Resources page and select the appropriate engagement letter. Please note that once you e-sign, you will receive an email to confirm your identity. You will need to confirm your identity for your signature to be fully executed.

*Complete the Tax Questionnaire:* Click on the Tax Questionnaire button, and complete and submit the questionnaire. It takes approximately five minutes to complete.

*Upload Your Tax Documents.* To securely upload your tax documents using ShareFile, select "Tax Document Upload" on the Client Resources page. Enter your name and email, and simply drag and drop. Please use the PDF file format.

Once these three steps are complete, you will be placed into our queue and the tax return process will begin.

### **Step 2: Tax preparation**

The assigned tax preparer will review your information and tax documents and be in touch by phone or email with any questions. If necessary, a conference call can be scheduled.

Upon completion, the tax preparer will contact you to communicate the result and provide a description of the next steps.

### **Step 3: Electronic delivery**

The completed return will be delivered electronically through a secure and convenient tax return delivery system called SafeSend Returns. You will receive an email with a SafeSend link, and from there you will be able to securely download a copy of the return, e-sign your e-file authorization form, make any IRS payments, and pay your tax preparation fee.

That's it! If you have any questions about the process, please feel free to contact our offices. Thank you and we look forward to working with you.