Tax Preparer's Guide

Please follow the steps listed below:

Step 1: Meet with client and go through the Tax Organizer questionnaire, Complete and let them sign the form.

Step 2: Collect all necessary documents to ensure accuracy. Write all documents received from the client at the Tax Organizer questionnaire.

Step 3: Communicate to the client that it will take 3 -5 business days or longer (if the documents are incomplete) in providing an update. If there's any missing information or any questions – expected to respond within 24 – 48 hours (Both client and Tax preparer).

Step 4: Prepared Tax 2019 will be forwarded to the client for review and approval.

Step 5: Completed, Reviewed and received approval from the client that they have agreed with the prepared TAX File 2019 then it will be transmitted to IRS directly. Payment MUST be obtained before E-File.

Check payable to: REACH Insurance Services

Cost per transaction varies, as it depends about the client tax situation.

Thank you so much!