Tax Partners: please feel free to message me with any questions to my personal number.
Non-Tax Partners: any questions, please email me to: Admin@MaryRoque.com.

STEP-BY-STEP PROCESS OF WHAT HAPPENS WHEN A CLIENT CALLS YOU TO DO THEIR TAXES:

Step 1: Initial Client Contact

- The client reaches out via phone, email, or social media.
- You introduce yourself and briefly explain your tax preparation services.
- You ask basic questions to determine if they are a new or returning client and what type of tax return they need.
- If they decide to move forward, you inform them about the next steps.

Step 2: Sending the Client Questionnaire

- You send the client a **Client Intake Questionnaire** (via email, text, or through your client portal).
- The questionnaire gathers essential details such as:
  - Personal information (name, DOB, contact info)
  - Filing status (single, married, head of household)
  - Dependent details (if applicable)
  - Income sources (W-2, 1099, self-employment, etc.)
  - Deductions & credits eligibility
- You instruct the client to complete and return the form before moving forward. In certain circumstances I complete this form with the client over the phone to expedite the process.

Step 3: Requesting Tax Documents

- After receiving the completed questionnaire, you request the necessary tax documents, including:
  - **Income Forms:** W-2s, 1099s, K-1s, etc.
  - **Deductions/Credits:** Receipts for business expenses, child care expenses, medical bills, etc.
  - **Prior-Year Tax Return:** If they are a new client.
- If they have dependents, you request:
  - Birth certificates
  - Social Security cards
- **<u>Tax Partners</u>: You can provide our Tax App link, use Verifyle.com, or request they email the documents if they feel comfortable.**
- <u>Non-Tax Partners</u>: You can use secure websites like https://verifyle.com/ or request they email the documents if they feel comfortable.

Step 4: Reviewing Documents & Preparing the Return

- Once you receive all necessary documents, you review them for completeness and accuracy.
- If anything is missing, you follow up with the client.
- You begin preparing the tax return based on the provided information.

Step 5: Client Review & Signature

- Once the tax return is ready, you schedule a call or send a secure preview for the client to review.
- You discuss any final details, deductions, or changes.

- The client signs the return electronically:
    - **<u>Tax Partners</u>: You can use our Tax App, Verifyle.com, or https://www.docusign.com/.**
    - <u>Non-Tax Partners</u>: You can use secure websites like Verifyle.com, or https://www.docusign.com/.

Step 6: Filing & Confirmation

- After receiving the signed return, you electronically file it with the IRS and state tax agency (if applicable).
- You send the client a confirmation that the return has been successfully submitted.

Step 7: Post-Filing Support

- You provide the client with a copy of their tax return for their records.
- You offer guidance on what to expect next (refund timeline, IRS processing, etc.).
- You inform them about your year-round tax support and invite them to return next year.

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