

# EXCELERATE TAX LLC

## Below is a description of our tax preparation process

Step 1. Consultation is free first 15 minutes. After that, for every 15 minutes, it is \$30.

Step 2. You sign an engagement form with us via DocuSign. This engagement form is a list of questionnaires letting us know the facts surrounding your tax return. We prepare your tax return based on information you have given us.

Step 3. We require a deposit of half the fee or full. Please note, once we started, our charges are NONREFUNDABLE

Step 4. We will email you a link to upload the documents to a secured portal. Please do not email us the forms and do not text us the forms.

Step 5. During the process, we may need you to answer additional questions related to education credits, earned income, and dependent information

Step 6. Once we are done with the tax return, we will

- Upload to the portal a DRAFT return to review
- We require that you pay us the other half during this step
- We send you an efile authorization form

Our individual tax return has audit protection included in the price. You can learn more about it at [Tax Audit Defense™ \(taxprotectionplus.com\)](https://taxprotectionplus.com)

Here are a few scenarios causing delays:

1. Missing reportable income
2. New social security in your tax return - new baby, new spouse, your 1st year filing taxes
3. Incorrect information so please check everything

We will not know what issues causing your returns to be delayed. If you want to call the IRS, the number to call is 800-829-1040 from 7 a.m. to 7 p.m. local time.

For most taxpayers, we need the following documents:

- 2021 tax return – if you are a returned client, we have this information.
- Driver license
- 1099, 1099G, w2's
- If you have Obamacare, form 1095A
- Any other documents to assist with the return