

Welcome To the MobileTax.Pro Process!

by ReVision Financial Solutions LLC

Here is an overview of our simple **VIRTUAL** Tax Preparation process: Snap. Chat. Done.

<h1>1</h1>	<p>Snap.</p> <ul style="list-style-type: none"><input type="checkbox"/> Download and complete the appropriate Intake forms for your tax situation. This form reviews many of the most common types of income and expenses reported on the tax return. It also helps you avoid missing deductions that can lower your tax liability and increase your refund.<ul style="list-style-type: none">✓ go to www.MobileTax.Pro (and read more about our services while you are there),✓ then click 'Resources'✓ Select the Intake Form you need:<ul style="list-style-type: none">➤ The Simple Form: for Seniors, Students and Simple Filers,➤ The Standard Form for returns with children, Itemized deductions, and Credits,➤ The Advanced Form covers the most common types of income, including investments income,➤ The Complex Form includes the Business Expense and Home Office worksheets. <p>Note: each form contains a Consent to Use, which allow ReVision Financial Solutions LLC (RFS) to contact you and Engagement form that authorizes RFS to complete your tax return.</p> <p>Please sign all three forms and submit with your documentation.</p> <ul style="list-style-type: none"><input type="checkbox"/> Snap pictures of your documents with your smart phone, tablet or mobile device camera OR scan with your computer and scanner, then upload:<ul style="list-style-type: none">✓ go to https://MobileTaxPro.SecureFilePro.com/,<ul style="list-style-type: none">OR click on any one of the "Portal" buttons on the website✓ on the right under Guest Exchange click 'Upload',✓ enter your Full Name, email address and in the message box enter your cell phone number,✓ click 'Select', then upload each of your documents one at a time,✓ once all of your documents are listed, click 'Upload' to finish. <p>You can also choose to drop-off documents at our Langtree office in Mooresville Monday thru Friday, 8:30am to 5:00pm: 106 Langtree Village Drive, Suite 301 in the Regus office, take the ramp to second floor, then elevator to third.</p>
<h1>2</h1>	<p>Chat.</p> <ul style="list-style-type: none"><input type="checkbox"/> RFS will process your documents and complete your tax return.<input type="checkbox"/> You will be contacted to arrange a video conference to verify your identity and review your tax return. It can be conducted on any smart phone, mobile device or computer.<input type="checkbox"/> Once you approve the return, you will receive one final document to sign (required by the IRS).
<h1>3</h1>	<p>Done.</p> <ul style="list-style-type: none"><input type="checkbox"/> Upon RFS receiving your signed authorization, your return will be e-filed to the IRS.<input type="checkbox"/> Your tax return will be delivered to you securely through your SecureFilePro account and you will receive an email notification of the upload and instructions for logging into your account. You should maintain your tax return for at least 3 years.<input type="checkbox"/> You will receive notification once the IRS accepts your return.<input type="checkbox"/> If your return is rejected, you will be contacted, in short order, to correct and re-submit.