



Tax LinkUp

VIRTUALLY PROTECTING & SERVING TAXPAYERS

NO STRESS TAX SERVICE

Welcome

Tax LinkUp is a cloud-based tax preparation service designed to serve our clients remotely from the comfort of their home. Our experts look forward to learning and understanding your tax situation to maximize your tax return. Tax LinkUp delivers a tax preparation experience that is professional, personal and convenient for our client.

Tax LinkUp utilizes top-notch tax software integrated with secure document exchange, file storage and is a mobile-friendly web application. Through the Secure File Portal, clients communicate, upload files, e-sign returns and access tax information anytime.

We are committed to professionally serving each client to ensure a comprehensive tax return with discounted preparation fees.

To link-up with a tax expert, follow the simple steps to begin your remote tax filing.



1. CONNECT WITH A TAX LINKUP EXPERT

Set-up an appointment to connect with a tax professional via zoom, face-time or teleconference for introductions and gather some basic information to get started on your return.

- [Schedule Appointment](#)

OR have all your documentation and ready to begin, click on Quick Start Return link. You will be routed to Tax LinkUp's Secure File Pro portal, then click Upload.

- [Quick Start Return](#)



2. SECURLY UPLOAD DOCUMENTS

After linking up with a tax expert, you will receive an email with details to access your Secure Client Portal account. Through secure file upload form exchange attach documents. You will receive a confirmation email upon receipt of your items.

Secure client portal is also a mobile-friendly Web application.



*All new clients include prior year tax filing information.

3. TAX PREPARATION BEGINS

A tax expert verifies all required information and documents have been received. If additional information or documents are required, you will be notified through the Secure Client Portal instant message.



4. REVIEW, FINALIZE & APPROVE

Once tax returns are complete, you will be notified via Secure Client Portal and email to review. Please make sure to thoroughly review all name(s), address(s), identification number(s) and reported tax return information before approval e-signing.

At your request link-up with a tax professional via zoom, face-time or teleconference to discuss and review your return. Or send a message through the Secure Client Portal.



5. SIGN, PAY & E-FILE

Finally, complete these final 3 steps and you are all set!

- ▶ Give TaxLinkUp LLC permission to e-file your taxes. Tax LinkUp LLC will provide your authorization forms via secure email from Drake eSign Online which will allow electronic signing of your tax forms. This package will include your tax preparation engagement letter and e-file authorization forms for federal/state tax returns.
Joint filers require separate electronic signatures for each taxpayer.
- ▶ Carefully read, sign & date your E-Signature forms no later than 1 day after you receive E-Signature email; E-Signature forms over 48 hours will need to be resent.
- ▶ Pay tax prep fees electronically. Full payment is required before e-filing. (Exception only applies to Refund Advantage clients.)
 - PayPal
 - Square

*We utilize Drake eSign Online, a company that meets the IRS Electronic Signature Guidance for Forms 8879s.

Within 3 days after e-filing, you will receive a confirmation email from our tax team advising you that your tax returns have been Acknowledged, Received & Accepted from the appropriate tax agencies.



WE LOOK FORWARD TO
SERVING OUR TAXPAYERS

www.TaxLinkUp.com
Taxlinkup@taxlinkup.com
602.284.4547

*Tax Linkup is environmentally friendly, so let's work
together & save trees.*

Thank you!

