TAX CLIENT WELCOME GUIDE

Everything you need to know before we prepare your return.

WELCOME TO MEMPHIS TAX COMPANY

Professional.
Secure.
Personal.

A modern client resource from Memphis Tax Company, designed to help you know what to expect, what to provide, and what to do next.

Updated September 2026

WELCOME - WE'RE GLAD YOU'RE HERE

A Better Tax Experience Starts With Clear Communication

Our goal is to provide ethical, accurate and client-focused tax preparation through education, communication and a well-organized process. We want you to understand what we need, what happens next, and what you are signing before your return is filed.

OUR APPROACH

We prepare returns using the information and documentation you provide, ask questions when something needs clarification, and give you an opportunity to review your return before filing.

YOUR ROLE

Provide complete and accurate information, upload requested documents, respond to follow-up questions, review your return, and tell us about anything that changed during the year.

Important

You are responsible for the information reported on your return, even when a paid tax professional prepares it. Never sign a return you have not reviewed or do not understand.

Contact Memphis Tax Company

Phone: 901-866-9660   **Email:** april@memphistaxcompany.com
Website: memphistaxcompany.com

YOUR TAX PREPARATION PROCESS

From Intake to E-File

1. Start & Portal Access

Complete your intake and use the secure client portal to upload documents and exchange sensitive information.

2. Upload Your Documents

Send all tax forms and supporting records before preparation begins. If something is missing, we may ask you to wait until it arrives.

3. Review & Follow-Up

We review your documents, ask follow-up questions, and identify any additional records that may be needed.

4. Return Preparation

Your return is prepared based on the facts and documentation provided. We may contact you if additional clarification is required.

5. Client Review & E-Sign

Review names, Social Security numbers, income, dependents, bank information and the final tax result before signing.

6. E-File & After-Filing Support

Once required signatures and payment arrangements are complete, the return is transmitted electronically. You will then receive our After You File Guide.

SECURE PORTAL, COMMUNICATION & FEES

Keep Sensitive Information in the Client Portal

For your privacy, upload tax documents, identification and other sensitive records through the secure client portal rather than ordinary email or social media messages.

Client Portal

Memphis Tax Company uses TaxDome for document upload, e-signatures, messages and other client workflow. Use the portal invitation or login information provided to you.

IDENTITY VERIFICATION

A valid government-issued photo ID is generally required. Additional identity, residency or dependent documentation may be requested when needed for the return.

COMMUNICATION

Please keep your phone number and email current. Respond promptly to portal messages so your return does not stall while we wait for missing information.

BILLING

Your preparation fee and payment timing will be shown on your invoice or engagement materials. Required signatures and payment arrangements must be completed before e-filing.

NO RUSH FILING

We would rather file an accurate return than a fast return. Please wait until you have received all expected tax forms before telling us your file is complete.

PERSONAL TAX DOCUMENT CHECKLIST

Start With These Core Documents

Not every item applies to every taxpayer. Upload the documents that fit your situation and tell us about anything unusual that happened during the year.

■ Government-issued photo ID	■ Social Security numbers / ITINs and dates of birth for household members
■ Prior-year federal and state tax returns, if requested	■ W-2 wage statements
■ 1099 forms for interest, dividends, retirement, unemployment, gig work and other income	■ Social Security benefit statement (SSA-1099)
■ Estimated tax payment records	■ IRS or state tax notices received during the year
■ Bank routing and account information for direct deposit or payment	■ Marketplace health insurance Form 1095-A, if applicable

Common Life & Family Items

■ Childcare provider name, address and tax ID	■ Education tuition statements and eligible education expenses
■ Student loan interest statement	■ Retirement and HSA contribution records
■ Charitable contribution records	■ Mortgage interest statement (Form 1098)
■ Property tax information	■ Major home sale or purchase documents
■ Adoption or dependent-support documentation, if applicable	■ Identity Protection PIN (IP PIN), if issued by the IRS

BUSINESS, SELF-EMPLOYMENT & RENTAL CHECKLIST

Business Owners & Independent Contractors

Good records are essential. Provide organized totals and supporting documents for the full tax year.

■ Gross receipts / sales totals	■ 1099-NEC, 1099-K and other business income forms
■ Business bank and payment-processor summaries	■ Advertising and marketing expenses
■ Supplies and office expenses	■ Business insurance
■ Professional fees and software	■ Vehicle mileage log and business-use information
■ Equipment, computers, furniture and other asset purchases	■ Contract labor / subcontractor payments
■ Business loan interest and financing documents	■ Home-office information, when applicable

Rental & Investment Activity

■ Rental income and security-deposit records	■ Mortgage interest, property taxes and insurance
■ Repairs, maintenance and management expenses	■ Closing statements for property purchases or sales
■ Brokerage tax forms, including 1099-B / consolidated statements	■ Cost-basis records for assets not fully reported by the broker

Business Tip

Separate business and personal spending whenever possible. Clean records make tax preparation faster and make it easier to support deductions if questions arise later.

IMPORTANT TAX-SEASON REMINDERS

A Few Things That Prevent Delays

WAIT FOR ALL FORMS

Employers, banks, schools, brokers and other payers may issue corrected or late forms. Filing before all information arrives can create amendments and delays.

REVIEW BANK INFORMATION

If you choose direct deposit or electronic payment, carefully confirm routing and account numbers before signing your return.

EXTENSIONS

An extension generally gives you additional time to file - not additional time to pay tax due. If you expect to owe, discuss an estimated payment before the filing deadline.

DEADLINES CHANGE

Federal and state deadlines can shift because of weekends, holidays, disasters or return type. Use current IRS/state guidance rather than relying on an old calendar.

Current IRS Resources

IRS.gov - federal tax information | IRS Individual Online Account

Need Help?

Call 901-866-9660 or email april@memphistaxcompany.com. If you receive an IRS or state notice, upload the entire notice to your portal so we can review what it says and the response deadline.

READY TO GET STARTED?

Gather your documents, complete your intake, and use your secure client portal to upload your information.

Memphis Tax Company

Tax Preparation | Tax Planning Support | Business Tax Services | Client Education

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Referral Program

We appreciate referrals. Ask us about any current referral promotions or eligibility requirements in effect at the time of your referral.

This guide provides general client information and is not a substitute for individualized tax advice. Tax law, filing deadlines and IRS procedures can change.