MEMPHIS TAX COMPANY

NEW CLIENT

Tax Preparation

WELCOME

GUIDE

Welcome!

HI FRIEND! I'M APRIL

I always greet everyone with, "Hi, friends" because I really hope that we can be friends. The tax preparation process does not work if we aren't working together. I always think, why not have some fun and make a lasting connection while we're hard at work for you!

I CAN'T WAIT TO WORK WITH YOU

Mission Statement: To provide ethical, moral and honest service. Provide a high quality tax preparation process via education, communication and relationship building.

Vision Statement: We aspire to be a company that puts clients before profits. We wish to measure our success by the quality of service we provide, not the quantity of clients we service. We hope to create long-lasting relationships built off trust while finding valuable solutions to clients tax problems.

WHAT WE OFFER

1

Personal Tax Prep

This service is available to individuals, married couples and students. Please have all of your documents ready when you sign up through our website. Once you have uploaded all of your information a representative will reach out to you for your phone interview.

2

Business Tax Prep

This service is available to businesses who have an LLC, S-Corp or C-Corp business. Please have all of your documents ready when you sign up through our website. Once you have uploaded all of your information a representative will reach out to you for your phone interview.

3

Tax Extension Processing

If you need help filing out your paperwork for a tax extension, we can help. Some of the forms for the IRS can be confusing but we're here to help. Get in touch today if you know you need an extension!

4

Audit Protection

We offer audit protection on all of our filing services. This means we will represent you in the case of an audit. This will limit your contact with the agency while we work on your behalf.

PORTAL ACCESS & BILLING

Photo ID

We need a copy of your photo ID to prove your identity. This must be a government issued ID that is not expired.

Current Utility Bill

A current bill in your name at your current address. This also helps identify your identity.

Portal Access

You will sign up for portal access at www.memphistaxcompany.taxdome.com. This is where you will pay your bill, submit documents, review your return and e-sign it.

Billing

Upon enrollment, you will be asked to pay our tax preparation fee upfront.

NOTE

Any billing that is not resolved after your taxes are submitted to the IRS will incur a late fee of 10% of your balance, monthly, until resolved. We will not file taxes for you or pay referral fees, going forward until this balance is paid in full.

THE PROCESS

Please sign up to get started on our website at www.memphistaxcompany.taxdomecom. This is where you will set up portal access, upload your documents and schedule your calls.

STEP 1

Portal Access, Upload & Schedule

Once you have access to your online portal, you will upload the documents we need in order to process your tax return. Upon review of these documents, we will determine if you qualify for our services and schedule a phone interview.

STEP 2

Phone Interview

During our phone interview we go over all the documents that were uploaded and ask for any remaining information we might not have. We go over questions and review some FAQ's from the IRS. Documents are then sent over for client review and signature(s).

STEP 3

Review & Submit Return

Once the tax documents are filled out, we review them with you during a second call. Once everything is countersigned by you, we electronically submit to the IRS. We then send an "After you File Guide". Returns take around 21 days to process by the IRS

STEP 4

IRS FAQ's

If you have any questions about documents that are needed or processing times, please visit the IRS website. When you have an account with them, you can track your refund, make payments or request important documents.

STEP 5

Referrals

When you refer your friends, collogues and friends to us, we pay out referral fees based off a tier system. You can read more about our program on our website. Be sure they list your name when they create their online portal. Thank you for your referrals!

Tax Prep Checklist

All Taxpayers

- [ ] SSN & DOB for anyone included on your tax return
- [ ] Lender loan statements
- [ ] Charitable donation receipts
- [ ] Cost of last year's tax prep. last year's tax return, checkbook
- [ ] W-2, W2-P and/or K-1 forms. 1099 forms for all income
- [ ] Medical & health insurance expenses and/or premiums

Homeowners

- [ ] Mortgage interest statement
- [ ] Energy upgrade receipts & home improvement receipts
- [ ] Rental income
- [ ] Property taxes & insurance premiums
- [ ] Moving expenses
- [ ] Refinance or purchase documents

Business Owners

- [ ] Detailed income and expenses
- [ ] Assets and equipment expenses
- [ ] Mileage records

Tax Prep Checklist

Additional Items

- [ ] Estimated tax payments
- [ ] Education expenses
- [ ] Student loan interest statements
- [ ] College savings contribution
- [ ] Retirement/HSA contributions
- [ ] IRA/state DOR correspondence
- [ ] Social Security Benefits
- [ ] Unreimbursed employee business expenses
- [ ] Investment account issued forms
- [ ] Childcare expenses
- [ ] State & local income, sales and property taxes

Please upload any forms that are required into your portal and schedule your phone interview. We look forward to the opportunity to file your taxes on your behalf!

WHAT ARE THE IMPORTANT DATES THAT I NEED TO KNOW?

The three most important dates that MOST clients need to know are the following:

January 3rd - We open for the tax season

January 25th - The IRS begins accepting tax returns

April 15 - Tax Day! Taxes or extensions are due

October 15 - If you filed an extension, your taxes are now due

****These dates may vary each Tax Season**

READY TO GET STARTED?

Click below to book your consultation and get started right away! Don't wait until the tax deadline! Avoid penalties and late fees by booking now!

CLICK HERE