

Let Me Handle Your Taxes—Stress-Free and Hassle-Free

Tax season can be overwhelming, so I'm here to make it simple. People choose a professional tax preparer not just to navigate the complexities of the IRS code and maximize their refund, but also to reduce their stress.

Most people prefer the convenience of having their **taxes prepared 100% online via email**. This is the fastest and easiest way to get your return done. **Follow these Easy Steps for a Smooth Tax Preparation Process:**

1. For Simple Returns and you do not own a computer (W-2's Only, No Dependents, Not Married, etc.)

When your return is that easy, I do not want to make this process hard for you. Call or text me and I will walk you through how we will do it with just using your cell phone.

2. Gather All Your Documents

Wait until you have all necessary tax documents before sending anything. Once you have everything, email them all at the same time. *Do not text tax documents—please use email.*

3. Download the Personal Tax Organizer (PTO) and Engagement Letter from the TAX ORGANIZER tab.

Available on my website and takes just 5–10 minutes to complete. It helps ensure you don't forget any necessary documents. The Engagement Letter creates the agreement for me to be your tax preparer.

4. For Small Business Owners or Rental Property Owners

Download and complete the Business Organizer (BOTO), Rental Organizer (ROTO), and Mileage & Home Office Organizers to provide all necessary details.

5. Organize & Scan Documents to your computer

Create a folder on your computer labeled "2024 [Your Name] Taxes." Scan and save before sending.

6. Include a Copy of Last Year's Tax Return

A copy of your prior year's federal and state returns is helpful. If you don't have one, we can still proceed, but having it makes the process smoother.

7. Driver's License Requirement

Missouri and Illinois require information from your driver's license. Please email a clear photo of the front of your license. If filing jointly, include both spouses' licenses.

8. Health Care Coverage (Form 1095s)

If you received health insurance through the Marketplace or another source that requires a 1095 form, include it. *Not required if your employer provided coverage all year.*

9. Send Your Documents Securely

Email everything to **TaxPro.Steve@gmail.com**, or use my **Secure Portal Service** (see the "How to Use Secure Portal Service" section under the Tax Organizers tab).

10. When I am done, I email a password protected PDF copy of the returns to you. You review them and Authorize me to Efile non your behalf. Then you pay me with Venmo, PayPal, Cash App, or Check.

Questions? Reach me via **email, call, or text**. Messages sent through this website may experience delays.

Let's make the tax season easy! I look forward to working with you.