## Tax Return Preparation Process:

## WHAT TO EXPECT

Our goal is to process all tax returns within three weeks of receiving information\*. We are committed to completing all returns by April 17<sup>th</sup>, provided we have all information by March 24<sup>th</sup>. All other returns will be extended to the October 16<sup>th</sup> deadline.

- Collect ALL Tax Documents
- Fill Out Tax Checklist
- Upload Tax Documents to Client Portal (SmartVault)
- For Business Returns: Provide Quickbooks Access

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• Notify Office Staff when ALL Documents are Uploaded or Dropped Off

Day 2-14

- Staff Accountant Enters Data and follows up with client if there is missing data
- Return Reviewed CPA
- Epic Trust Sends Electronic Signature Request & Calendly Invite to Schedule Review Meeting via Phone, Zoom, or in person

Day 15-21

- Client Reviews & Signs Tax Return
- Client Selects Service Level: Premium, Full Support, or Essentials

Once Signed

- Epic Trust Files Tax Return with IRS & Processes Tax Preparation Fee
- Electronic Client Copy of Tax Return Available Via SmartVault

Once Filed

- Refund Status (if applicable) Available from IRS.Gov/Refunds
- IRS EFT Withdrawl for Taxes Due (if applicable)



