

Steps to completing a virtual return

Contact us, we will send a checklist, and intake form for you to complete after a brief Zoom or phone call.

Upload documents and completed forms to your virtual folder. We will provide a quote for service.

Once 50% of quoted service fee is received, we work on preparing the return. We take it from here.

Once return is completed, we will review together, making any changes necessary.
After corrections are made, if any, we send the final bill.

Once bill is paid. - Return is submitted

An email will be sent once IRS accepts the return, with instructions on how to monitor refund or pay taxes due.