



## 2022 Tax Agreement

# What's Next?

# 1

**Please sign your tax engagement by the end of January!**

Once we receive your signed agreement we will send a tax questionnaire for your review & completion through Intuit Link.

# 2

At the end of January you will receive a second Intuit Link request to upload the tax documents you receive from third parties (W2, 1099, 1098, 1095, etc)

# 3

In order to prepare your tax returns by the due date, **we will need to receive your documentation by February 15<sup>th</sup>** (for business tax returns) **and March 15<sup>th</sup>** (for personal tax returns). A rush fee will apply if documents are received less than 2 weeks prior to the filing deadline unless an extension is filed.

## Helpful Tips.

A 50% payment is due at signature; the remaining balance is due prior to e-filing.

We will only file extensions on request, we will not file automatic extensions. We will not begin work until we receive your signed agreement

Tax returns will be prepared in the order signed agreements are received, pending all tax documents being provided.