

Tips on how to have a smooth tax season experience and save on your fees!

1. **Schedule an appointment** if you feel that you need a true consultation, about significant situations or dramatic changes from the prior year or if you are a new client. We enjoy time with our clients; however, our main goal is to complete your return timely. Please be aware that appointments during tax season are for preparation of returns NOT tax planning. Planning appointments can be booked for May or June. You can now book your tax appointment online at www.MGAssociatesLLP.com.
2. **Watch for our communication.** We send out helpful hints and mass communication through our Facebook page, please Like us at www.facebook.com/M-Greenwald-Associates-LLP. We also provide access to all of our forms on our website under “Tax Season Forms”.
3. **Delivery of documents.** Organizing all your documents and delivering them at one time in a complete and organized package will help us be efficient.
 - a. Late Arriving investment statements and K-1’s can be submitted when you receive them if you anticipate they will arrive after March 15th.
 - b. Please provide all additional information requested in one set within 48 hours of our request. Incomplete responses will require additional communication which will be billed.
 - c. The IRS is doing their best to provide you with online access to your records. You can now communicate directly with the IRS by signing up for their new “Get Transcript” at www.IRS.gov/Individuals/Get-Transcript. You’ll be able to access wage and income documentation, prior-year returns, and any outstanding balances.
4. **Delivery method.** Please send all your documents together and please send them to us in one consistent format. If you mail us your documents, we do not also need them emailed or uploaded, this causes confusion and we have to compare both sets which takes extra time. Do not take pictures of all documents and email them, pictures are time consuming to download and often unreadable. Driver’s license is the only exception.
5. **Limit email exchanges.** Sometimes we will request additional information or explanations – please be complete in your responses. Multiple email exchanges and questions at the end of the return preparation process require time and will be billed in addition to the return preparation fee.
6. **Order of completion.** Our policy is to work on returns in the order they are received, substantially complete, in the office. Please do not request “rush service” if you were unable to turn in your documents earlier.
7. **Extension of filing.** Not all returns can be filed by April 15th because of late arriving information (out of your control) or backlog in our office. Generally, returns received in the office after March 15th may not be completed by the April 15th deadline. Please be aware that there is no increased risk of audit for extended returns. However, any taxes are still due by April 15th which may require (if time permits) some additional work to determine a tax extension payment. Our office is not responsible for any penalties for underpaid taxes.
 - a. All returns requiring extensions will be sent an Extension Agreement which must be signed and returned to our office before we can file the extension.
 - b. Our office will now require a minimum \$300 retainer on any return that we received the information* after the March 15th deadline.
 - c. There is a \$300 fee for extended returns that we have not received information* for by June 15th.
* Please note this does not include information beyond the client’s control such as K-1’s and investment statements.
8. **Late changes to your return.** Once your return is completed there will be charges for “forgotten” information that require a re-work of the return.
9. **Phone call vs email contact.** Due to the heavy volume of work and the level of concentration required to produce error free returns we ask that you present your questions **via email and not through a phone call.**

It is our goal to process your information and turn around your return as quickly as possible. We do our best to streamline the process and your cooperation in these areas will help us to serve you better.