TAX SEASON 2019 IS FINALLY HERE AND WE'VE GOT 5 EASY STEPS THAT WILL MAKE YOUR TAX PREPARATION GO SMOOTHLY THIS YEAR.

THE W2 GROUP
EXCELLENCE | EFFICIENCY | EXECUTION

1. Get Ready
2. Get Started
3. Stay Alert
4. Review Your Return
5. Sign & File

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Step 1: Get Ready

WE'VE MADE SOME NEW CHANGES AND SO DID THE IRS. HERE'S WHAT YOU SHOULD KNOW TO GET READY:

New Tax Service Offerings

We've adjusted our tax service offerings for 2019. Our plans are now tailored to fit your specific needs. On **January 24th** we will publish these packages and give you the ability to select the tax service that fits your needs directly on our website.

Opening of Filing Season

The IRS has announced filing season will begin Monday January 28th. This means the IRS will be ready to accept your returns for processing. Due to the new tax law changes and government shutdown processing delays are still expected. So if you're ready to file consider filing early to get ahead of the crowd.

Tax Deadlines

Just about every 15th day of every month you can find an IRS deadline. Knowing when your taxes are due helps you to be proactive when it comes to budgeting for payments or unexpected time constraints.

Click the hyperlink on the previous screen to see the Tax Deadline Schedule for 2019.

Step 2: Get Started

YOU'VE PICKED YOUR TAX PACKAGE AND YOU'VE GOT ALL OF YOUR DOCUMENTS. HERE'S WHATS NEXT..

Engagement Letters

Once you make your tax package selection we'll begin working on your 2018 tax return engagement letter(s) for your review and acceptance.

Not sure what package to pick or having trouble making a selection online? No problem, got to our website, click the "Book an Appointment" button and select "Tax Pricing Package Questions".

Document Portal

Once you've accepted the engagement letter we will invite you to your personal document portal. To make sure we are doing our part to safeguard your information we are only accepting tax documents through your personal client portal.

Click the invite from **Intuit Link** to log in. In this portal you will be able to complete the 2018 questionnaire and upload your documents. Just drag and drop your documents from a file on your computer or upload pictures from your phone.

Step 3: Stay Alert

YOUR TAX RETURN IS IN PROCESS BUT WE MIGHT NEED SOME MORE INFORMATION TO FINISH.

Look Out for Tax Team Emails

Get to know your new team for 2019. We may have some follow up questions or it's now time to finalize your return. Here are all the key players assisting you this tax season:

Jeff Wilson – Director (jwilson@wiicpas.com)

Don't worry – Jeff's not going anywhere. We know it wouldn't be tax season without our fearless leader calling you at all hours of the night. We've just expanded our team around him to help provide you the best level of service this filing season.

Got a tax question for Jeff? He's still available via email to take a look at your tax return and ease many of your tax season worries.

Phylicia – Director of Tax (pbuie@wiicpas.com)

Phylicia joined the firm this summer (but you probably know her as Phy). She's had the opportunity to get to know many of you as we closed the last filing season. With a Masters in Taxation (MST), 10 years of individual, business and non-profit tax experiences in real estate, wealth management and small businesses, we hope you'll agree she's a welcomed addition to the team.

When it's time to talk strategy, dive into the details of your tax return or simply wrap it all – she's your go to this season.

Theresa – Firm Administrator (admin@wiicpas.com)

The person you really want to know is our new Firm Administrator – Theresa. One email and you'll realize she the glue that holds the firm together. Whatever you need she's either already got it or knows the best way to get it to you.

Need a copy of your tax return? Want to check the status of your e-filed or amended return? Feel free to reach out to her at the email above for help.

Step 4: Review Your Return

ALL DONE AND NOW IT'S TIME FOR YOUR REVIEW.

Tax Package Delivery

When your tax return is complete we'll send your completed Tax Package electronically. The Tax Package will include a copy of your tax return, a brief analysis from the Director and the pages you'll need to sign to complete your filing.

Review Your Tax Return

Seriously...look it over and let us know if you have any questions, comments or additions. When you're ready visit our website, click the "Book an Appointment" button and select "Tax Return Review".

Step 3: Sign & File

YOUR TAX RETURN IS COMPLETE. NOW IT'S TIME TO SIGN IT AND SEND IT OFF. HERE'S WHAT YOU NEED TO KNOW:

Electronically Filed Return - Individuals

We've partnered with DocuSign again this year to bring you electronic signature capabilities. Your tax return link will allow you to sign your e-file authorization pages on just about any device - your tablet, phone or computer web browser. Sign, submit and your done!

Electronically Filed Return - Business

Unforutately, we do not have this capability for our business filers – but no biggie. We've found a work around. Visit your personal documents portal to gather your business tax package. Print the e-file authorization forms and resubmit your signed pages to the document portal.

Paper Filed Returns

In the event your return must be paper filed we've still got you covered. Visit your document portal and print the file that contains your signature pages. Sign and mail your pages back to our office for filing.

Confirmations

Once the IRS confirms acceptance of your e-filed return we'll upload the confirmation to your portal. If we paper filed – we'll upload the certified mail receipt for your records as well.