Tax Preparation Map

1

Let's get started!

We'll email you an invitation to access our secure client portal. TaxDome is an automated program that provides secure document storage, messaging, and payment of invoices. For access email mark@howestax.com.

2

Engagement Letter & Retainer

Before we can begin work on your taxes we'll need to collect your signed Engagement Letter and retainer.

3

It's time to collaborate!

Once you've completed step 2, we'll send a message asking you to fill out your electronic Tax Organizer and upload the applicable documents. It's easy!

4

Is everything uploaded? Great!

After we've reviewed your documents Mark will assign you to a tax preparer.

5

Work in Progress!

During the tax preparation process, we may request additional information.

We ask that you communicate through TaxDome. This helps keep a clear record of information exchanges for all of us!

6

Tax Prep Done!

When we've finished your return. A draft copy will be uploaded to TaxDome with your final invoice attached. Your retainer fee has already been deducted from your balance due!

Once your invoice is paid the tax return will unlock for review.

7

Let's File Electronically!

It's safer and faster.

We'll upload the e-file authorization forms after your draft is approved. Once the forms are signed, we can e-file your returns!

8

The Finish Line!

After your tax filing has been accepted, we'll upload the final copy of your return to the appropriate folder in TaxDome.

9

Review and Planning?

Some clients like a post-return meeting to review and discuss the results of their return.

Depending on your situation you may want a meeting with one of the Enrolled Agents to plan for the upcoming year.

-Do you need tax planning?
-Do you need to meet with a CFP?
-Do you need a living trust?