

# Tax Preparation Map



## Tax Work Done!

While we have finished the tax return, it is still in a draft format so we can make changes if needed.

Your draft copy will be uploaded to Taxdome with a final invoice minus the retainer paid in the beginning.

After you have paid the balance, the tax return will unlock and you can review.



## Done! Done! Done!

We've finished! A full client copy of your taxes will be uploaded to the appropriate folder.

Do you need tax planning?

Do you need to meet with a CFP?

Do you need a living trust?



## Start with Mark

You need an invite to join the club!

New Clients - will receive there's after the interview

Returning Clients - Check your email.

If you need an invite, email Mark@howestax.com



## Everything uploaded? Great!

After we have reviewed your docs for anything missing, Mark will assign you to a tax preparer.



## Work Time!

Now that someone is assigned your taxes, you will communicate directly with the tax preparer.

All messages should be communicated through Taxdome. If you message via email, you might cause a delay in your preparation.



## Your in, Now time to collaborate!

Our team is dedicated to help you with your taxes but it takes two to tango.

Once you have finished the second task, you will get a message asking you to upload documents.

You will upload everything and then Mark will check it for completeness.

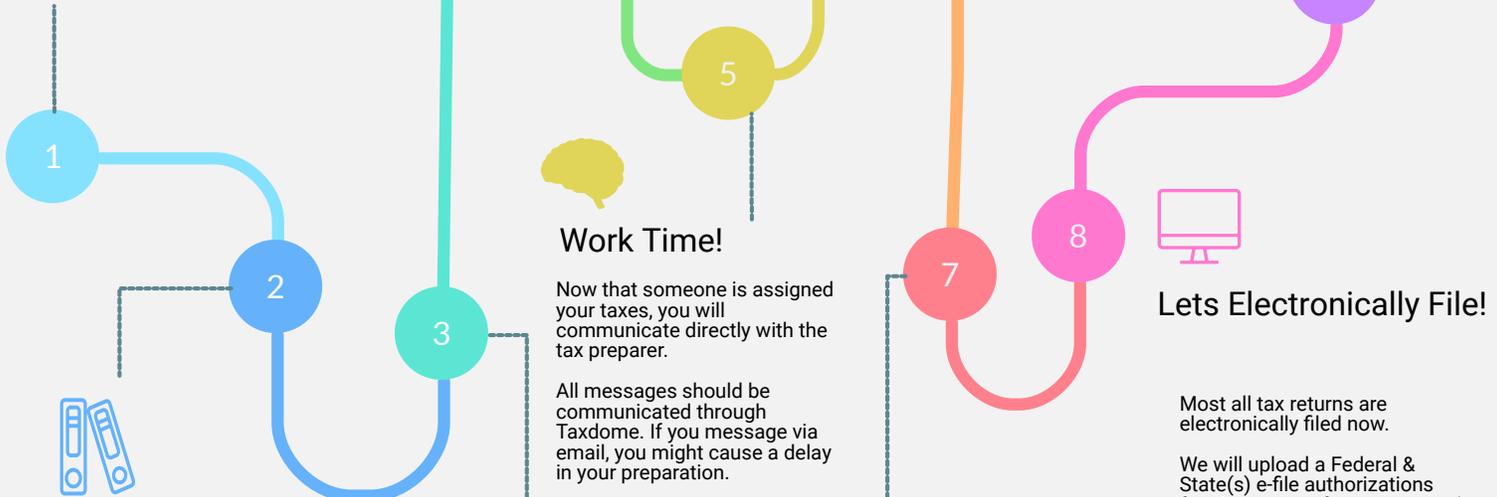


## Review or Not!

We understand that not everyone needs a tax review.

After you have paid your final invoice and you have reviewed your taxes, you will be able to request a tax review with the team.

This will be when we make our suggestions and tell you if you need to sit down with one of the Enrolled Agents to plan for the upcoming year.



## Engagement Letter & Retainer

Taxdome is an automated program that provides secure messaging, invoice payments and secure document storage.

To get your taxes started, these two tasks must be completed before any work starts.



## Lets Electronically File!

Most all tax returns are electronically filed now.

We will upload a Federal & State(s) e-file authorizations for signatures of your approved tax return for your signatures.

Without signatures, your tax return will not be filed.