

PREMIER ACCOUNTING SERVICES, PC

Certified Public Accountants

P.O. Box 89

Pitman, NJ 08071

Phone: (856) 256-0330 Fax: (856) 589-2192

www.premieraccountingpc.com

Tax Return Procedures for Tax Year 2022

Hello Clients. It's Tax Time again!

As in the past three years, in place of in-person appointments we ask that you either drop off your tax documents into our locked drop box; mail them in; or upload them to your Smartvault portal account.

Tax preparation fees for 2022 tax year returns are a *minimum* of \$350 per return. Returns with business, rental, or multiple schedules will be more. Preparation fees for dependents will be a *minimum* of \$125.00.

There are no scheduled drop-off dates, please **wait** until you are sure that you have received **everything** needed for us to prepare your tax return and then provide your documents to us. Receiving your documents at multiple times will result in delays and additional preparation costs. This includes documents uploaded to the portal. Therefore, please wait until you have everything and upload at one time.

Once you have all your documents, please provide them to us as soon as possible. Typically, early to late February we receive an extremely high volume of client documents and processing times will take longer due to the volume. We will do our best to keep you posted of any significant delays.

PLEASE NOTE: Any documents dropped off after March 15th may result in your tax return needing to be extended.

The following outline details the tax return preparation procedures and the various methods to provide your tax documents to us:

1. DROPPING OFF or MAILING IN DOCUMENTS

- a. Remove documents from envelopes and remove staples** - Remove your documents from the envelopes they came in and remove any staples. This will help us to efficiently process your documents for tax preparation. We will scan all pertinent documents so anything in envelopes or stapled will result in an increase in processing time and cost.
- b. Total medical bills, expenses, and donations** – Please only provide a **total** for medical costs, other expenses, and donations. Please do not supply every receipt, bill, EOB, expense, or donation confirmation. Providing a list of medical bills/donations/expenses is fine as long as they are totaled. Including individual bills, expenses, EOBs, and donation receipts could result in additional preparation fees if we need to go through the supplied documents and total them.
- c. Questionnaire and Tax Organizer** – **Complete and submit with your tax documents a taxpayer information sheet and questionnaire found under the “Resources” tab on our website.** Please call if you want a customized organizer mailed, emailed or uploaded to your Smartvault portal.

- d. **Dropping Off** – When dropping off your documents please place them in one of the two lock boxes located outside the office at 40 N. Woodbury Road, Pitman, NJ. All documents should be in a large envelope or folder, so they stay together. The lock box is available 24 hours a day, 7 days a week and emptied multiple times each day.
- e. **Mailing** – Documents can always be mailed to Premier Accounting Services, P.O. Box 89, Pitman, NJ 08071. If mailing your documents, we strongly suggest you use priority mail in order to track the delivery.

2. UPLOADING

- a. If you have digital copies of your tax documents, you may upload them to your secure Smartvault Portal. You can find the Smartvault Portal at www.premieraccountingpc.com and click on the Client Portals tab; once there, click on Smartvault Portal. We encourage you to upload all your documents at one time after you have everything. If you need additional support with regards to the portal, please let us know.
- b. Please review the information in b & c above in Dropping Off/Mailing In with regards to medical expenses and the tax organizer.

3. WHEN WE PREPARE YOUR RETURN

If there are any questions when your tax return is being processed, your accountant/preparer or a staff member will call or email you, and if necessary, schedule a telephone conference or a zoom meeting to go over those questions.

4. AFTER PREPARING YOUR RETURN - SIGNING AND EFILING

- a. Once your tax return is complete, a copy will be uploaded to your Smartvault portal for your review and then your 8879 Authorization form, which authorizes us to E-file your return, will either be sent to you electronically through DocuSign; mailed to you; or we will call you to come pick up for review and signing. If you are signing a paper Form 8879 Authorization to E-file form, either drop in the locked drop box or mail it to us.
- b. **IF you have additional questions or concerns, please DO NOT sign the 8879** to allow us to E-file until those questions or concerns are addressed. Instead, contact the office and we will either schedule a telephone conference, communicate through email, or set up a zoom meeting to address those questions or concerns.
- c. Once we receive your signed 8879 Authorization to E-file form, we will Electronically file your tax return.

As always, anytime you have a question or concern, we are available via telephone at 856-256-0330.

Sincerely,

John J. Fitzpatrick, CPA

Brian R. Masessa, CPA

Heather Tierney

Rachel Furman

Michele Cressman and the Staff of Premier Accounting Services, PC