

Tax Preparation Policies & Terms 2017

Updated 11/09/2017

APPOINTMENTS

SCHEDULING

- **Appointments MUST be made a *minimum of 5 days in advance*.**
 - ALL available appointments can be viewed on our website, or obtained by calling our office. If it's not on the calendar, it's not available. If you'd like an earlier date/time, let us know and we'll happily call you as soon as something's opened up!
 - Your account must be in good standing to schedule an appointment.
- **Your scheduled appointment applies *only to the person(s) attending*.**
 - If you intend to bring a tax return for others, take the following steps:
 - Inform our Support Team via email, your client portal, or phone.
 - **Why?** We need to add this return to our work schedule!
 - You must provide us with a phone number/email and full name
 - Inform us if they will need an extension.
 - **The bill for the return(s) must be paid prior to tax preparation.** Tax preparation will begin when payment is received.
- **Scheduled Appointments apply *only to the current tax year*.**
 - It is assumed that the appointment/work is applicable only to the current tax year! If you have any additional years for us to complete, take the following steps:
 - Inform our Support Team via email, your client portal, or phone.
 - Wait for your LINK invite for each year and upload the info/documents requested.
 - Be prepared to pay the fee for that tax return **before our team begins tax preparation**. Tax preparation will begin when payment is received.

SOURCE DOCUMENTS

- We require all requested material to be delivered **via Intuit's LINK program**.
 - You will be invited via email, and required to answer questions provided and attach the necessary documents. Our team will provide support, and informative emails with visual guides to help you use LINK.
 - **Doing this will save you \$15 on your tax return! :)**
- ALL documents required for the completion of your tax return must be sent via LINK or email a **minimum of 3 full days prior** to your appointment. Mailed/faxed docs must be received a **minimum of 3 full days prior** to your appointment. Otherwise, you'll be asked to reschedule.
 - Why? Our prep work for each appointment takes about 3 days to complete.
- Any documents submitted to us in physical form (paper copies, NOT sent via LINK or email) **will not be returned!**
 - **Please Note:** If you send your documents via any channel other than LINK, we may not see them in time! If this happens, you may be asked to reschedule your appointment.

CANCELLING

- Cancellations **must be made a minimum of 3 days prior** to the time & date of your appointment.
 - If a cancellation is not made 3 days prior, **a fee of \$25** will be applied to your bill for failure to show, and you will be asked to reschedule.
 - **Why the fee?** We've got a lot to do during our busy season, and we need every minute. Those 3 days of prep work are valuable to us.
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PAYMENT

WHEN PAYMENT IS REQUIRED

- **Payment is required before or at the time of your appointment.**
- We accept e-checks, checks, cash, & all major credit/debit cards
 - Please note that **no tax preparation will be performed** until you have settled your bill for the services requested.
 - We perform lots of other tasks for you and your return before tax preparation even begins... This is why we require a down payment.

YOUR BILL

- **The payment requested at the time of your appointment is an estimated cost.** This means that this is the amount you will pay if there are no additional forms required for completing your return.
 - Your estimated fee is based off of the work/procedures required for preparing last year's return.
 - **Why charge more for forms?** Forms take up time, a lot of it. Not to mention the state/fed government sometimes like to charge us for them! Unfortunately, we have to pass that fee on to you.
 - We'll refund any extra money you paid in your down payment if your return turns out to be easier/less complicated than expected!
 - **We'll notify you of any additional charges prior to billing you.** No surprises!
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TURNAROUND

STANDARD TAX RETURN COMPLETION

- Provided that all the terms listed above were met by you, our team guarantees **your tax return filed in 3 weeks or less!**
- **If the terms above are not met, we cannot guarantee completion until the official tax deadline of April 15 for individuals, and September 15 for Businesses.** We also reserve the right to file an extension if the necessary info has not been provided, and a \$25 fee will be added to your bill.
- If for any reason we cannot complete your return in 3 weeks (emergency, or we encounter something during prep that means your return may take longer) We'll notify you!

EXPEDITED RETURNS

- If you need your tax returns done quickly, we offer an ***expedited preparation service for an additional \$35***, to be added to your bill. The full amount must be paid prior to/at the time of your appointment.
 - ***The expedition fee is non-refundable.*** If we schedule your expedited return, begin work, and you fail to provide the necessary documents and information on time, we'll have to reschedule.

EXTENSIONS

- Let us know if you'll need an extension, & pay the **\$25** extension fee up front or over the phone,
 - ***Your extension will not be filed until the extension fee is paid.***

Thank you for taking the time to carefully read our 2018 updated Tax Prep Policies. If you have any questions or concerns, please feel free to reach out to us in any of the following ways:

- Call us at 951.369.4902
- Email us at clients@skysmb.com
- Visit us at skysmb.com
- Stop by! 4505 Allstate Drive, Riverside CA. 92501
- HOURS: Monday - Thursday 8:30 AM TO 5:30 PM

We look forward to a successful and smooth Tax Season!