

Why did 72 million people e-file last year?

- **Accuracy** – e-file greatly reduces your chance of getting a notice from the IRS.
- **Security** – Your privacy and security are guaranteed.
- **Fast Refunds** – You get your refund in half the time, even faster with Direct Deposit.
- **Proof of Acceptance** – You will be notified when we have received your signed e-file forms. These forms will then be processed and submitted to the Internal Revenue Service.

72 Million Taxpayers e-filed last year! Shouldn't you?

- Department of the Treasury

It's as easy as 1-2-3-4!

- **Step 1 – Gather all your Source Documents.**

Here is some of what you'll need:

- Social Security numbers for yourself, your spouse, and any dependents.
- W-2 forms for yourself and your spouse.
- 1099 forms
- Receipts for expenses for itemized deductions.
- Bank account numbers for fast refund.
- Copy of voided check for direct deposit.

- **Step 2 – Tax Questionnaire and Organizer.** Using the source documents you have collected complete the Tax Questionnaire and the Organizer. When completed return both to our firm.

- **Step 3 – Send in your Source Documents.** Drop off or mail your source documents along with your signed engagement letter. Don't forget to ask to be e-filed!

- **Step 4 – E-File** Review your return and sign e-file forms. Once e-file forms are returned to our office, your returns are ready for e-filing.

Electronic Payment Options

- You can e-file your federal income tax return (Form 1040, 1040A, or 1040EZ) and, at the same time pay any balance due with a check and voucher.

Did you know . . .

- More than half of all taxpayers will file electronically this year.
- Thirty-seven states and the District of Columbia allow taxpayers to file their federal and state returns electronically at the same time.
- Discover any social security number differences quickly.
- E-filing helps save the environment by using less paper.

