HARPER BUSINESS SOLUTIONS
Reaching Beyond Numbers

HBS Tax Preparation Filing Guide

This tax prep filing guide outlines HBS procedures and policies for tax filing through us. It is imperative this guide is read, as we are confident it will help our clients and the overall tax filing process.

- The IRS will begin accepting tax returns in **January 2022.** The specific date has not been determined yet. Once it is announced, we disseminate this information as well. Although, your return cannot be electronically filed until this day, you may begin your tax preparation process beforehand.

- If this firm has not received all your tax return information by the deadlines indicated below, we cannot guarantee the ability to complete the return before the filing due date and an extension will need to be filed.

Entity Structure	Documents due to HBS	IRS Filing Deadline
S-Corp, Partnerships	February 15th	March 15th
Individuals, Corporation	March 15th	April 15th
Nonprofit Organization (calendar year-end 12/31)	April 15th	May 15th

- If your returns are not filed by midnight of **your respective IRS filing deadline**, you may be subject to and responsible for late filing and/or late payment penalties.

- Welcome new tax clients! We are happy to have you a part of the HBS family!
    - Please visit our **website** and book a tax consultation to discuss any tax questions you may have prior to engaging our services.
    - All new clients **must** sign an IRS Form 8821, "Tax Information Authorization" **or** furnish a copy of their previous year tax return (Federal and State). This ensures HBS does not omit and captures anything that may need to be included on the current tax return as well as help the client understand any outstanding liabilities or other tax issues. **This is not negotiable.**

- This office uses TaxDome to manage our engagements and client information. All clients will have their own client portal to upload documents and communicate with the HBS team.
    - Client portal access is available on the website.
    - Sending documents in unsecure methods is not acceptable nor conducted by this firm.

- All clients are **required** to complete tax organizers. Organizers are available to choose and complete within client portals for submission to HBS. Organizers will **not** be emailed.
    - Depending on your tax situation you may have more than one organizer.

- Once your organizer has been completed and all tax documents are uploaded, they will be reviewed. If any documents are illegible, you will be notified so they can be reloaded. After your documents are reviewed and accepted, your client tax engagement letter will be sent for your review and electronic signature.
    - It is **vital** you read the engagement letter in its **entirety**.
    - If you are married, you and your spouse must sign the engagement letter (where indicated).
    - **No tax return will be completed without a signed engagement letter.**

- Tax preparation fees vary and are based upon the return type.
    - Client tax engagement letters indicate tax preparation costs. Tax return preparation fees may increase and are dependent upon the time and expertise required to accurately and comprehensively complete your tax return. If you have any questions, please feel free to reach out our office.
    - If your return requires any accounting work and preparation for completion, the tax return will be immediately stopped and an accounting engagement with a separate fee will begin. Once all accounting work is completed, the work to complete the tax return will start again.
    - **Protection Plus Audit Assistance is automatically included in every taxpayers filing at an additionally $60.00. If you do not want audit protection, you must sign the opt out form when engaging tax services.**

- A **$75 deposit** will be invoiced with the tax engagement letter and **must be paid prior** to any tax preparation beginning. The deposit will go towards to the final tax preparation invoice.
    - For example, if your total preparation invoice is $400, you will pay the $75 deposit invoice to begin your tax prep. Upon conclusion of your tax prep, you will be invoiced the remaining $325.

- Once tax prep begins, tax communication and updates will be managed through TaxDome to keep your information confidential and secure. Please make sure to check your email to stay abreast of portal notifications which may indicate tasks and updates for you.

- This office files returns electronically and must have your authorization to e-file.
    - **No return will be filed prior to client review and e-file authorization.**
    - **It will be your responsibility to review the documents carefully before signing the e-filing authorization form and filing of the returns to verify that the information is accurate.**

- To keep our office IRS compliant with e-filing, we send IRS Form 8879, "IRS e-File Signature Authorization," to clients for electronical signature.
    - **Your return will not be submitted for e-file until we receive the signed form.**
    - If Married Filing Joint, each spouse must sign before return is submitted.

- Upon completion, you will receive a final tax preparation invoice for payment. Clients have 10 days to pay final invoices. **Final copies of filed tax returns will not be released until payment is made.** We appreciate your prompt payment.

- Once final tax return documents are delivered to you, your tax return is treated completed. Of course, we would be pleased to respond at any time thereafter to your questions regarding this matter. The tax preparation engagement and fees **do not include** responding to inquiries or examination by taxing authorities. However, if the firm is available to represent you, the fees for such services are at the firm's standard rates and would be covered under a separate engagement letter.

Remember we are here to help make tax filing as seamless as possible and can only do that in part with your compliance. We appreciate you and your business!

Myranda J. Harper-Penn, CNAP

CEO, Harper Business Solutions