Tax Preparation Process:

Step 1: Make an in-person or virtual appointment

Step 2: Bring tax documents to an in-person appointment or forward tax documents to Pel & Associates ONE WEEK *prior* to your scheduled appointment.

Step 3: Discuss the tax return and documents with the preparer during your in-person or virtual appointment.

Step 4: Forward follow-up or missing documentation to Pel & Associates, if needed.

Step 5: An email will be sent with instructions on how to view your tax return in the secure Cloud Cabinet. If a paper copy of the return is requested, it will also be mailed.

Step 6: Review your tax return. Ask any questions you may have.

Step 7: Return the e-file authorizations to us. We will NOT e-file your return until we receive your signature. Your signature indicates that you have reviewed your tax return and asked all pertinent questions.

Step 8: Pel & Associates will e-file the tax return.