# Steps to completing a virtual return

Contact us, we will send a checklist, and intake form for you to complete after our introductory meeting via phone or zoom.

You then upload documents and completed forms to your virtual folder.

We will review and provide a quote for service.

Once 50% of fee for quoted service is received, we work on preparing the return. We take it from here.

Give us at least 48 hrs. to complete your return.

Once return is completed, the final invoice will be sent. Once paid, we schedule an appointment to review together, making any changes necessary.

When return is finalized, it is submitted to the IRS and your state (if applicable)

An email will be sent once returns are accepted, with instructions on how to monitor refund or pay taxes due.