



TAX PRO SOLUTIONS, INC.

Tips on Smooth Tax Filing and savings on your Fees!

1. **Schedule Appointment** – If you feel that you need tax consultation first, *about significant change of events in your life or if you are a new client*, feel free to call us first at 917-892-2571 or email us at taxesbytps@gmail.com
2. **Email Exchanges** – In some circumstances, we will email you to request additional information or explanation (**Remember: We will not ask for personal sensitive document or information via email**). Please be complete in your responses and provide clear and concise information. Incomplete information may delay processing of your tax return and you may risk missing the tax deadline.
3. **Uploading Documents on Client Portal** – Our client portal is available for you to upload late arriving documents or *additional documents as requested* by us. To avoid confusion, **do not upload duplicate documents**. Create separate folders or label each document correctly with tax year in question.
4. **Order of Completion** – We complete and work on your tax returns in the order they are received. Our goal is to complete your tax returns in a timely manner and to avoid any delay, try to send complete documents all at the same time.
5. **Tax Deadline** – Our goal is to file your tax returns by the deadline but please remember all tax return filings cannot be done by the deadline of April 15th **due to late arriving of documents/information (not in your control) or backlog at our office**. Generally, complex tax returns need more time to ensure accuracy and all documents **must be received no later than March 15th**. **Surcharge fee** will be added if you like us to file your tax return by due date (fee depends on the complexity of the returns).
6. **Extension of Filing** - We can file extension (**Our fee is required to be paid for filing extension which later will be adjusted once tax return is filed**) for IRS and State tax returns but remember any taxes are still due by April 15th. Since it requires us to calculate your estimate tax payments (if time permits and if we do not have all required documents), our office will not be responsible for any penalties for underpaid taxes. We recommend paying 100% of tax due with the extension to minimize future penalties.
7. **Changes after filing tax return** – If after completing and filing your original tax return, you had additional documents that was required to be filed, additional fees will be charged to file Amended tax return (fee vary case by case).