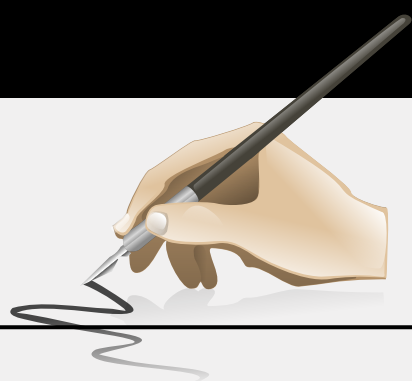


DOOLEY & COMPANY'S TAX RETURN PREPARATION PROCESS



1) SIGN ENGAGEMENT LETTER

Sign your engagement letter sent to you via Docusign or in our office

2) PROVIDE TAX DOCUMENTS

UPLOAD your tax documents to our secure portal at dooleyandcompany.smartvault.com.

- Returning clients can access a tax organizer based on your prior year return.
- New clients will need to request a blank organizer & access to the secure portal.



Notify our office via an email to communications@dooleyandcompany.com once your files are uploaded and ready to process.

-OR-

DROP OFF your physical documents at our office, either in the drop box outside the front door or bring them inside during business hours.



3) RETURN IS COMPLETED

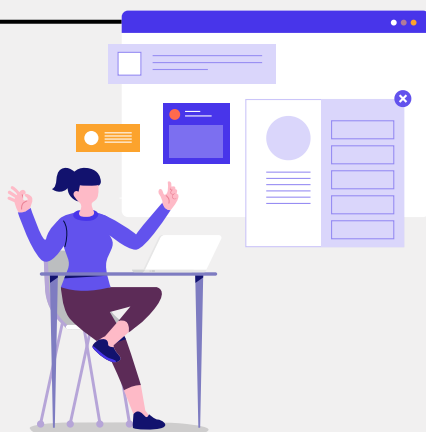
Your file is prepared in the order that it is received. During peak season, this process can take up to four (4) weeks.

4) REVIEW, SIGN, PAY

Once your return is completed, you will receive an email with the following:

- Review Copy of your returns
- Efile Authorization Forms via Docusign
- QuickBill via CPACharge

Efile forms and payment must be received by our office before returns are filed.



5) RECEIVE YOUR COPY

Once your return has been filed & accepted, the following will be uploaded to your secure portal:

- Electronic copy of your return
- Payment voucher(s) (if you owe)
- Quarterly estimated payment vouchers (if applicable)

An official hardcopy of your return(s) will be mailed to you in the following weeks, along with any physical documents you provided.



REFUNDS

If you are due a refund, these are typically direct deposited within two (2) weeks of acceptance. Track your refund via the IRS.gov and/or your state Department of Revenue websites.



IF YOU OWE

Balances owed are due by April 18, 2023.

Although we provide payment vouchers, we highly recommend that you make both liability payments and quarterly estimated payments via the IRS.gov and/or state Department of Revenue websites.

