

J. Oaks, CPA, MBA, LLC – Our Process

The First Step is to Gather Important Documents

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Gather all important information needed to complete your tax return:

- Your tax return from last year, including attachments
- Social Security numbers for yourself, as well as your spouse, dependents and child care providers (if applicable).
- All tax forms received for the year such as W-2s, 1099s, mortgage interest statements or any other statements relating to income or expenses.
- Small business and rental real estate owners, prepare summary of income and expenses for year
- All known tax deductions (eg., charitable contributions, medical expenses, extra state tax payments related to last year.

The Second Step is to Copy and Send Documents

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Bring in or send copies of:

- Your prior year's tax return,
- Current year's tax documents
- Forms supplying your personal information

Send to J.Oaks, CPA, MBA, LLC – via email, mail or fax

Upon receipt, a tax counselor will contact you with confirmation of receipt and begin your free initial consultation, in 1-3 business days.

The Third Step is to Submit Payment of Initial Deposit

A large white number '3' is centered on a solid olive-green square background.

Once you have decided to work with our company, you will then be required to pay the initial deposit of \$50 for our preparers to begin work on your tax return.

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The Last Step is to Sit Back, Relax & Let Our Firm Complete Your Tax Return!



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Your tax return is drafted and then reviewed by a CPA in 3-5 business days. We may contact you with additional questions needed to uncover adjustments that will optimize your tax return.

Upon resolution of such questions, a CPA will do a final review. We will discuss the results with you by phone. **Final payment is due upon your approval of the final tax return.** An adobe PDF copy of your completed return, with attachments included, is emailed to you.

Filing Your Return:

You decide the means of transmitting the return to IRS (regular mail or e-file). J.Oaks, CPA, MBA, LLC is an authorized E-File Provider, and can e-file your return for you. Contact us for more details.

Refunds:

You decide the means by which IRS will return your refund (direct deposit into your bank account or check in the mail). We can set this up for you. Contact us for more details.

Payments to IRS:

If an income tax payment is due to IRS, you may either mail it with the return, or have it direct debited from your account. We can set this up for you. Contact us for more details.