When the final review and quality control process has been completed by the Senior Tax Professional, the client will have the option to review the tax return before filing. It's important to note that reviewing the tax return by the client before filing isn't a requirement, but it is recommended. This review allows the client to ensure that all information is accurate, complete, and reflective of their financial situation.

If a client prefers to review their tax return before filing, they can easily schedule a review session with our team. Here's how they can do it:

1. **Contacting Our Office:**
    - The client can reach out to our office via phone, email, or through our website to request a review of their tax return.
2. **Scheduling Appointment:**
    - Our Support Team will assist the client in scheduling a convenient appointment for the tax return review.
    - They will coordinate with the client to find a date and time that works best for their schedule.
3. **Confirmation of Appointment:**
    - Once the appointment is scheduled, our office will send a confirmation to the client via email or text message, detailing the date, time, and will include a meeting link for the review session.

4. **Preparing for the Review:**
   - Prior to the scheduled review session, the tax preparer will ensure that the client's tax return and all relevant documentation are readily available for review.
5. **Review Session:**
   - At the scheduled time, the client will meet with their designated tax preparer for the review session.
   - The tax preparer will provide the client with a copy of the completed tax return and walk them through each section, explaining the information presented and addressing any questions or concerns.
6. **Discussion and Clarifications:**
   - During the review session, the client can discuss any discrepancies, errors, or areas of uncertainty with the tax preparer.
   - The tax preparer will provide clarifications, make any necessary adjustments, and ensure that the client is fully informed and satisfied with the tax return.

7. **Approval for Filing:**
   - Once the client is comfortable with the accuracy and completeness of the tax return, they can provide their approval for filing.

- This typically involves signing the necessary authorization forms or providing electronic consent for electronic filing.

8. **Follow-Up Communication:**
    - After the tax return has been filed, our Support Team will follow up with the client via email to confirm that the return has been submitted to the IRS.

By offering clients the option to review their tax return before filing, we aim to promote transparency, trust, and confidence in our services. We encourage all clients to take advantage of this opportunity to ensure that their tax return accurately reflects their financial situation and meets their individual needs. If you would like to schedule a review of your tax return, please don't hesitate to contact us. We're here to assist you every step of the way!