



At Action Accounting, we understand the importance of accurate and timely tax preparation. Our tax return process is designed to ensure that your tax filing experience is smooth, efficient, and compliant with all relevant regulations. From gathering information to filing your return, we are committed to providing you with personalized service and expert guidance every step of the way.

## **Overview of the Tax Preparation Stage of the Process:**

### **1. Information Gathering:**

- We begin by gathering all the necessary information and documents needed to prepare your tax return.
- **We cannot start working on the tax return until we have all the required documents and information.**

### **2. Assigning Your Return to a Tax Preparer:**

- Once all necessary information is collected, we assign your tax return to a dedicated Tax Preparer.
- The Tax Preparer carefully reviews your information and begins the tax preparation process.

### **3. Tax Preparation Process Timeline:**

- **Tax preparation typically takes approximately 3-4 weeks from the date we receive all the required documents and information.**



- During this time, our Tax Preparer meticulously prepares your tax return, ensuring accuracy and compliance with relevant tax laws and regulations.

#### **4. Updates on Return Status:**

- We understand the importance of keeping you informed throughout the tax preparation process.
- We will provide regular updates on the status of your return and notify you when it is ready to move to the internal review and quality control process.

#### **5. Final Review and Quality Control:**

- Once the tax preparation is complete, the tax return undergoes a thorough quality control check by a designated quality control specialist or manager.
- This involves comparing the tax return against the client's documents and the firm's internal checklist to ensure all requirements are met.

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.



By following this tax return process, we aim to provide you with peace of mind knowing that your taxes are prepared accurately and filed on time, allowing you to focus on what matters most to you.