

Tax Preparation System

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(1) Use an Organizer

We email out custom tax organizers to prior year clients. We start calling in January to confirm email addresses and phone numbers, we password protect organizers and email them out.

This organizer includes a one page checklist of documents that were dropped off last year. At a minimum, this must be used to make sure that you have all of your documents for us to get started.

Generic blank organizers are available on the website. www.dougzandstra.com

Worksheets for vehicle expenses, rental property etc... are also available on the web site

(2) Get us your information

We encourage clients to simply drop off their tax information, including the tax organizer. If you wish to have someone available to review your information when you drop off, you must use the online scheduler. We can answer quick questions, and see if we have all of the information.

(3) Use Online Scheduling

The web site allows you to schedule appointments for drop off, that way our lobby does not get overloaded and you (our clients) do not get frustrated. Scheduling is simple, go to the web site www.dougzandstra.com, and use the set an appointment box. Allow for 2 - 3 days in advance.

(4) Downtown Parking

We will validate your parking at the City Parking Ramp located directly across the street at 28 Pearl, it is the Pearl and Ionia ramp. We do not have parking arrangements with the lot next to the building. The City Ramp is covered. You will not have to scrape snow off your car when you leave.

(5) Courier Service

We have a courier service. If you cannot or prefer not to come downtown, we work closely with a service that can deliver or pick up tax information within the greater Grand Rapids area for an additional cost of \$10.00 - \$15.00 per trip.

(6) Communicate with email, or a text,

Voicemail is updated daily the online calendar links to my appointment book until the end of April.

Texting is very much encouraged. The office number (616-970-3000) is set up for texting.

(7) Turnaround Time

Tax preparation turnaround is generally 3 - 7 days, it all depends on the completeness of the information that is provided. We are paperless, and organized.

(8) Documents and Storage

Clients are provided with a paper copy of their tax return, as well as return the original documents. We do store your tax returns and documents electronically, so we can always email them to you securely with a password.

(9) Fees

Fees Standard Fees. We post standard fees on the website, you can review them there. Those fees are based upon your completion of the appropriate tax return organizer. We

can provide organizers based on last years tax return information, or there are blank organizers available at our website.

Standard fees include an appointment to drop off and quick review of your information if needed.

Consultation. Appointments for "consultation" are not included with standard fees. Fees for consultation are posted at www.dougzandstra.com. Those can also be scheduled using the web site.

Subsequent Changes. Additional information supplied to us that require additional time, processing charges as well as filing amended returns are billed in addition to standard fees. It is important to be as thorough as possible when gathering, and providing your tax return documents and organizer to us.

If you wish to minimize your tax preparation fees, we encourage you to complete the organizer, supply us with all of your final tax return documents, and resolve any issues in advance that you become aware of.

(10) Payment

Payment for services and tax returns are due and payable prior the transmittal of your tax returns. We can make special arrangements to accommodate, but they need to be made in advance.

At this time we do not accept credit cards.

(11) Extensions

We rarely file tax extensions. The tax deadline has been April 15 for a very long time. If you wish to have your tax returns extended, I would encourage you to seek another accountant.

If you have any questions after that, feel free to call.

Thanks