

# Getting Started

## Tax Return Preparation

Posted December 7, 2018

Here is a quick list of the necessary steps to have The Watson CPA Group prepare your tax returns. Important dates and considerations during the tax extension season-

	Individuals / C Corps	Partnerships / S Corps
	1040 / 1120	1065 / 1120S
Tax Documents Due	<b>Mon, March 25</b>	<b>Mon, February 25</b>
eFile Authorizations Due	<b>Mon, April 8</b>	<b>Fri, March 8</b>
Filing Deadline	<b>Mon, April 15</b>	<b>Fri, March 15</b>

Our normal tax return preparation turn around time **after receiving everything we need** is **7-10 days**. We will update you with email and text alerts along the way. During tax season, we have a soft-close at **3:01PM on Fridays** to enjoy some chips and salsa, and to unwind a bit. Our tax season drink is the Moscow Mule with cucumber and grapefruit vodka- stop by and join us. Apparently having fun before 3:00 is frowned upon in our establishment. Back at it on Saturday!

Put a face to the name and voice- [2017 Tax Team](#)

### 1. How Does It Work

The buttons below will take you to a simple, customized online submit form for you to seamlessly send your information. This ensures a comprehensive tax return and an economic tax preparation fee. All submissions are uploaded to your Client Portal within 24 hours for historical safekeeping. You will receive an email and a text alert letting you know we've received it. Communication is key!

**[The Watson CPA Group takes the security and safety of your personal information very seriously. Please read our security and privacy procedures.](#)**

### 2. Gather Your Tax Documents

These buttons link to a PDF which provides a quick checklist of the items we will need to complete your individual tax returns (businesses are next). We cannot emphasize enough that reviewing these checklists will ensure accuracy and completeness.

[Individual Checklist \(shortie\)](#)

[ExPat Checklist](#)

[Individual Checklist \(long\)](#)

[Flight Crew Checklist](#)

Business owners, **such as partnerships and corporations**, have unique tax needs simply because most of the tax documentation is generated by the business owner. Please use the following buttons for important checklists and templates for business tax return preparation.

[Biz Checklist \(shortie\)](#)

[Small Biz Worksheet Excel](#)

[Biz Checklist \(long\)](#)  
[Accountable Plan](#)

[Small Biz Worksheet PDF](#)

The Taxpayer Mistakes PDF is not necessary for the preparation of your tax returns- it is just a fun read in your spare time.

[Taxpayer Mistakes](#)

### 3. Contact Information

Please update your contact information. Even if you are a returning client, please confirm your phone numbers and email addresses. Also, the IRS and several states are requiring that a **government issued ID be electronically submitted** with your tax returns to curb identify theft. Use the button below to complete our fillable PDF. We cannot file without it (sorry).

[Contact Information](#)

### 4. Tax Organizers

Each button below takes you to a fillable PDF tax organizer to provide us critical information for the completion of your tax returns. Our tax organizers are home-grown and specifically designed to be a) efficient and b) educational as we take you through the various tax matters that affect you. We have also combined all our tax organizers into one massive PDF.

[Dependents, Care](#)

[Education, 529](#)

[Home, Deductions, Charity](#)

[Rental Property](#)

[Property Sale](#)

[Small Biz, LLC, S Corp](#)

[Automobile Expenses](#)

[Home Office](#)

[Expat Worksheet](#)

Please review the tax questionnaire form below to detail medical, ACA, divorce stuff, tax payments, etc. **Please don't overlook this.**

[2018 Tax Questionnaire](#)

### 5. Client Engagement Letter

The IRS and our Professional Liability Insurance provider are getting more stringent on Client Engagement Letters. We have created an easy online review and acceptance form. Seriously, it is easy.

[Client Engagement Letter](#)

### 6. Send Us Your Tax Stuff

This is the best part. You can scan and upload to the client portal, fax, mail or take a road trip.

### Client Portal

Contact us to receive login instructions to your [Client Portal](#). If you have already chatted with us, you should have received two emails- a welcome email, and another with login instructions. Check your junk folder too. Use the button below-

[Client Portal](#)

We receive a notification that you have uploaded files.

## Send a File

You can also securely send us your files by using [Send A File](#). Please use your name and a brief description as the file name such as 'SmithJohn-W2'. These files will be placed in your client portal. Use the button below-

### [Secure Send A File](#)

Similar to the client portal, we receive a notification that you sent us files.

## Fax

855-345-9700

All faxes will be transferred to your client portal as a PDF. We will email you with the number of pages received, and send a follow up text.

## Mail, Road Trip

Please retain your originals and **send or bring copies** to:

Watson CPA Group  
9475 Briar Village Point Suite 325  
Colorado Springs CO 80920

We have a strict requirement for all road trip drop-offs to include donuts. Sorry for the inconvenience.

## 7. Tax Return Review and Filing

You will receive an email and a text message alerting you that your tax returns are ready for your review. What does that mean? And what happens next? Both great questions. There are two review checklists, one for individual tax returns and one for corporations and partnerships.

[Individual Tax Return Review](#)

[Corps, Partnerships Review](#)

## 8. Cross ~~TAXES~~ Off Your Chores List

Book that summer vacation and let us know where.. we need some ideas for April 18! Yes, the 2017 filing deadline is Tuesday, April 17. Yuck for us. Good for you.

## 11. Light Reading

Here is some light reading about some popular topics.

[401k Rollover Options](#)

[Retirement Tax Bomb](#)

[Asset Protection Trusts](#)

[Retirement Planning](#)

[Stock Market Volatility](#)

[Wills and Probate](#)