Scheduling Tax Appointment with JJ&A

1. Get a quote of fees: In order to get a quote, please email your tax situation (example: I own a home, sold stocks, have 2 rental properties, and have foreign assets, business). We will give you a fees range to have an idea of our fee.
2. If you are okay with the fees, please gather all the relevant tax documents and we will email you a link to our secure site to upload your tax documents in PDF/JPEG or any other formats.
3. Once you have done uploading all the tax documents, please let us know and we can set up a time to review and file the tax returns. We will also let you know the FINAL tax prep fees once you have submitted all the tax documents to our server (or emailed us)
4. We will prepare the tax return before you come for the appointment for review and filing. If you need to preview the tax return we would need you pay us our full fee.
5. Our fees are due at the end of the appointment and we take credit cards/ checks. We expect to get paid at the end of the appointment or prior whether you file with us or not
6. You can always go back and take your time to file the return after reviewing and any updates we will make for free. However, if you add additional tax documents, we will charge extra and we will send you a link to pay additional fees
7. Please bring your bank routing number and account number for direct deposit of refund or paying taxes due online
8. Once you ask us to e-file the documents, you will get an email notification with the e-File status. If not, please check the e-file status link on the home page of our website
9. Please make sure you check the FAQ section of our website before scheduling a tax appointment