Scheduling Tax Appointment with JJ&A

1. Decide the office location to meet -- Fremont or Santa Clara
2. Get a quote of fees: In order to get a quote, please email your tax situation (example: I own a home, sold stocks, have rental properties, and have foreign assets, business). We will give you a fees range
3. If you are okay with the fees, please go to the home page of the website and download the PDF's at the very bottom. This list has all common tax documents and you can use this list to gather relevant tax documents
4. Note that if the actual documents are more than the documents listed while obtaining the quote, the fees will also change
5. When you come for the appointment:
   a. Please bring hard copies of all the tax documents (which we will return back to you). If you don't have a printer, please email us soft copies and we will print for you
   b. Please be on time for the appointment as we have back to back appointments during the tax season
6. If you like a soft copy, we can either email a PDF with a password or you bring a USB drive
7. 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 whether you file or not
8. 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
9. Please bring your bank routing number and account number for direct deposit of refund
10. Once you ask us to efile the documents, you will get an email notification with the eFile status. If not, please check the efile status link on the home page of our website
11. Please make sure you check the FAQ section of our website before scheduling a tax appointment