

Frequently Asked Questions

What are your hours of operation?

From January 1st to January 31st we are open Mon-Fri from 9 a.m. to 5 p.m.

From February 1st through April 15th we are open Mon-Thurs from 9 a.m. to 7 p.m.

From May 1st to December 31st we are open Monday through Wednesday from 9 a.m. to 5 p.m.

What should I bring to my appointment if I am a new client?

See our new client organizer on the worksheet page. That has what you will need.

Do I have to make an appointment or can I drop my information off instead?

If you are already a client of ours, you may drop off or mail in your information. When you do, please make sure we have good contact information for you including phone numbers, a current address and an e-mail address. In the event you are a new client we would prefer to talk to you prior to getting your information. So, please contact the tax preparer directly before you send us any information.

When do I pay for my tax return?

Paying at your first appointment is advised, although many clients pay for their return when it has been finished and is ready to be signed.

Will it cost me anything to come in for an appointment?

Yes. During tax season our time is in great demand and therefore it is more expensive to see us during this period. In the off season it usually costs much less than it would to see us during tax season.

What should I bring in if I refinance or purchase a home?

You should bring in the final settlement statement. The settlement statement is the document that shows all of the expenses for the closing of the loan. It should have been given to you at the time of closing. If you cannot find it, the title company should have a copy.

Where's my refund?

If you electronic file and direct deposit the tax return should process after you have signed and paid for your return within sixteen days. You will not receive any other notification of the direct deposit so, check with your bank. If it has passed this time period and the bank has not received the deposit you should check directly with the IRS (irs.gov) or call the IRS at 1-800-829-4477. You will need the Taxpayer's Social Security Number, filing status and the exact amount of you refund in whole dollars.

Can I pay my amount due with a credit card?

To pay your liability by credit card for a fee (American Express, Mastercard, DiscoverCard, Visa) call the number(s) listed below and follow the recorded instructions. Confirmation numbers will be given to you on all credit card transactions and should be retained with your records.

Federal	1-888-972-9829, 1-888-872-9829 or 1-888-729-1040
California	1-800-272-9829

How long should I wait for a return call from my preparer?

All of our preparers will try to respond to your call or e-mail within 48 hours of being in the office. If it has been longer than this, please contact us again, there may be a problem with our contact information for you.

Do I have to talk to the IRS?

No, as Enrolled Agents we can speak to the IRS on your behalf if you provide us with a completed Power of Attorney Form (2848). Just call us if you need help in dealing with the IRS and we'll provide you with a 2848 to sign.

I talked to a friend and they said I could.....

There are many rumors out there regarding taxes. The best way to see if what you've heard is really ACCURATE is to contact your preparer. There are a lot of scams and half-truths-don't get yourself into trouble-just ask us. You may e-mail your preparer directly from our home page and by clicking below their picture.

I just got a notice-what should I do?

We will need to get a copy of the notice. You may mail it, e-mail it or drop it by. But, do not put off getting it to us. IRS and the state tax notices are time sensitive and need to be dealt with in a timely manner. Even if you think the notice is correct it is best to let us look it over before you respond.

What should I bring in if I've sold real estate or stocks this year?

For a real estate sale, the settlement statement and 1099S is preferable, while a stock sale usually causes a 1099B to be sent by the brokerage that handled the transaction. So, if you have received a 1099B please bring it with you to the appointment. For both of these transactions we need to find out how much you have spent on the asset and when the asset was originally purchased. This can be provided through handwritten records but, oftentimes the brokerage will have what they call a cost basis statement that they will provide you when they send the 1099B. If you didn't receive one it is a good idea to call them and get a copy of your cost basis statement before your first appointment. Also if you had made improvements to the property or reinvested taxable dividends, we need to know how much was paid in these instances.

Do I need to file taxes if I only receive Social Security income?

Usually if you have no other income, property sales, investment transactions or gambling winnings during the year social security income does not require you to file. If you have any questions about this feel free to contact us.