

Appointment Day/Time_____

READ ME FIRST!

Wimberley TaxAide TY2024

<http://wimberleytaxaide.info>

Before signing up for an appointment:

- Review poster “How We Can Help You Today”, to verify we can prepare your return. Its on the poster board and is the top sheet in the sign up binder.
- Be certain all your tax documents will be available in time for the appointment. Brokerage statements normally are not available before mid-March.

Before arriving at your appointment: (Contact the Senior Center ASAP if you need to *cancel*: 512-847-1781; do NOT contact the Senior Center to *make* appointments or ask any tax questions)

- Review the entire contents of your tax packet; be sure you have, have reviewed, and have completed all forms appropriate to your situation, as indicated on the enclosed “Come Prepared” and “Documents We Need” instructions. If you do not have or have not completed all appropriate forms when you arrive for your appointment, you may be asked to reschedule. Expect to spend one to two hours organizing and completing all the forms.
- You will need to bring all forms and documents to your appointment. Copies are preferred over originals, if possible, as we will be keeping them for preparation (but we will return all). *Print paper copies of electronic documents.* Wearing of a COVID mask at your appointments is optional
- If Married Filing Joint (MFJ), only one spouse needs to attend the first appointment. However, *if you are approving* any of the consent forms (pages 5-8 in the Intake booklet, Form 13614-C), the absent spouse must have signed and dated each *beforehand*; also be sure to bring valid documentation for the absent spouse’s Social Security number, and a copy of the spouse’s photo ID.

(OVER)

At the appointment: (about 1 hour; maximum of two persons may attend; no children please)

- Be on time. If you arrive too late, you may be asked to reschedule.
- Initially, we will review your documents to ensure you have all that you need and that any forms are completed as needed (10-15 min).
- Secondly we will interview you to ensure we and you have no questions about the return or preparation process (30-45 min).
- We will schedule a short appointment (10-15 min) for you (and spouse if filing jointly) on the following Friday to sign and pickup your return along with all the documents you provided at the first appointment.

Return Preparation: We will keep all provided tax forms to prepare and quality review your return off site during the week. We will not keep any original IDs or Social Security cards. We will call you if we have any questions. Please make every effort to respond timely to any calls so as not to delay preparation.

Second appointment (15 minutes; contact me ASAP if you need to reschedule - see note at bottom):

- If Married Filing Joint, both spouses must be available to sign; one spouse may stay in the car if desired.
- We will verify your identity, return all documents we kept at the first appointment, briefly review and give you a copy of the return, answer questions, and obtain signature(s).

Filing & Refunds:

- We will electronically file your return that evening. If you have not heard from us within 48 hours, you may safely assume the return was accepted and is being processed. We will not file by mail unless you have a valid reason for doing so; for mailed returns, it could be several weeks/months before the IRS will process.
- For refunds, Direct Deposits should arrive within 14 days of filing; mailed refund checks may take 4 weeks or more. If you owe a balance, we will provide a voucher form to mail in your check.

If you have questions on the above, including completion of the forms, or your scheduled appointment, you may call me at 512-461-0349. This is my personal phone; please do not share or abuse; call only if necessary to be ready for your appointment. I cannot answer any specific tax questions over the phone. Thank you - Chad.