

Getting Started with Expat Tax Solutions

Thank you for choosing Expat Tax Solutions (ETS) for your tax preparation needs. Our company's main location is in Macon, GA, however, we work with clients all over the world. You may visit our website at: [https:// expattaxsolutions.com/](https://expattaxsolutions.com/).

If you are not in the local area or simply choose to work with us online, the steps below will be followed while we prepare and process your returns:

1) REVIEW FEE SCHEDULE/SCHEDULE INITIAL APPOINTMENT/PAY DEPOSIT

- a) Client reviews fee schedule located on our website at: <https://expattaxsolutions.com/2024-fee-schedule/>.
- b) Client schedules appointment, which includes a **NON-REFUNDABLE** deposit payment when scheduled, via website at the following link: <https://expattaxsolutions.com/contact/schedule-an-appointment/>
- c) Client pays deposit in the amount of \$100 plus an additional \$100 per year if required to file for more than one year. For example, a \$300 deposit is due for 3 years of tax filings (\$100 for the 1st year, \$1000 for the 2nd year, and \$1000 for the 3rd year bringing the total to \$300). Payments should be made via the QuickBooks invoice emailed to you by our office where several payment options are available to include: Bank ACH, Debit, Credit Card and PayPal.

2) PROVIDE DOCUMENTS FOR FILING

- a) Client provides our office with First Name, Last Name, email address, and the last 4 digits of the primary tax payers SSN. If a joint return, please provide the info for the taxpayer that has been included first on the most recently filed return(s).
- b) ETS, will establish a secure online portal that you can upload/download your documents to. Client will receive an email requiring the establishment of a password.
*Please be sure to include a copy of taxpayer(s) **unexpired** State Driver's License or I.D. with uploaded tax documents*
- c) Client will complete a Checklist located in the Public folder of the secure portal and upload back into the portal. The Checklist can be filled out online without having to download and print. Client will also upload **all documentation** necessary to process return(s).
- d) ETS will review documentation and schedule an appointment with the client within 4 business days. We communicate with you via telephone, Zoom, and email. Although we would like to meet with you in person, video-conferencing provides us both the security and assurance that you are working with the person(s) from ETS and we are working with the person(s) we are servicing.
- e) During the scheduled appointment time, ETS will go over the Checklist and discuss documentation provided by the Client. If additional documentation is required, ETS will notify the Client at that time. If no additional documentation is required or after all additional documentation has been provided, it will take approximately 7 days to complete a tax year return(s). Multi-year returns may take longer depending on the level of difficulty and number of documents. Taxpayer will also be provided with an "estimated cost" to complete the return(s).

3) COMPLETION OF SERVICE/PAYMENT FOR SERVICES

- a) After completion of your return(s), ETS will provide you with an invoice and the results of your return(s) via email.
- b) Client will make the final payment on the return(s) via QuickBooks or you may opt to deliver or mail a check/money order to our office. If you have been pre-authorized to make your payment after receipt of your refund then disregard any instructions referencing payment. If pre-authorization is not granted, continue with the processing of your payment via QuickBooks.
- c) After your payment is received, ETS will send the DRAFT CLIENT COPY of your return(s) via DocuSign. Client will review the return(s) to ensure accuracy of all data and electronically sign the return(s). Once completed, ETS will receive a notification that the e-signing process has been completed.
- d) After documents are e-signed, ETS will e-file the documents. After both Federal and/or State are accepted, we will upload the final documents to your secure portal. If your documents can not be electronically filed, we will upload them to your secure portal for mailing or you may request that we sign and mail them for you. Form 2848, Power of Attorney, is required for us to sign your return(s). Additionally, we charge the standard USPS postage rate for mailing. Let us know this early in the process so that we can add the fee to your invoice.

That should conclude the processing of your return(s). If you should have any questions and/or concerns during this final phase, after the filing process, or at any point during the current tax year, please don't hesitate to contact us as we are available year-round.

Thank you for entrusting us with your tax matters and we look forward to working with you soon!

AMINA FINANCIAL SOLUTIONS LLC dba EXPAT TAX SOLUTIONS

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