

Post-Filing Instructions

OK, now that your return is done, here are some good steps to take and handy tools for any follow-up questions or issues that might arise...

1) Verify your bank account info - It's on page two of the 1040. I don't actually transmit returns until the end of the day, and this cannot be changed once the return is sent. It's a good idea to double-check it now. If you use the "fee collect" service (where I am paid from your refund) it goes to "their" account first so it won't be printed in that case.

2) Checking Refund Status - My web site has links to checking current year federal, state, and amended (1040-X) federal tax returns. Go to "yourtaxreturn.com" and click on the "After You File" tab. After the return is filed and accepted, I have no control over how long it takes the IRS or FTB to process the return.

3) If you chose the "Fee Collect" option (having my fees taken from your refund, plus the \$25 fee they charge for the service) please make sure I verified with you that I made that election. It seems to be the #1 item I miss (that's why the check box on Annual Client Worksheet Page 2 is very large this year ☺).

4) Low-Income / High-Refund returns are often scrutinized much more carefully. Refunds are often delayed with no specific reason given. We have no control over how fast the IRS will process these type of returns.

5) If you receive additional tax forms AFTER we filed the initial return - We will need to do an amended tax return. Please send me the tax forms and we will prepare a 1040-X (Federal) and CA Sch X (State) as necessary.

6) Receiving Correspondence from the IRS or FTB - Step 1 - Don't Panic! The most common reason is something was forgotten (omitted) from the return and this is usually easy to fix. Step 2 - Send me the letter (scan and e-mail, fax, drop off, whatever) - a phone call is useless at this point. I will have no idea how to respond until I have seen the letter. Other than the cover page, you do not need to send me any pages that are just text (instructions). I need to see the numbers and what they are changing (and why). Step 3 - I will contact you and let you know what needs to be done, or if it is truly time to panic and consider fleeing the country ☺.