Virtual Client Instructions:

1. Create a Secure File Pro account. Look in your email for an invitation to create an account. If you did not receive an email, please call us at (513)900-9513. Your PIN is the first 4 letters of your last name on a phone. For example, the last name Smith would be SMIT = 7648
2. Download this sheet and print it out at home.
3. Download and complete the Taxpayer Questionnaire and upload the completed form to Secure File Pro.
4. Scan or take good quality pictures of your Drivers License, Social Security Card, and upload to Secure File Pro..
5. Scan or take good quality pictures of your W-2s, 1099-MISC, K-1, 1099-R, 1099-INT, 1099-DIV, and any other source of income and upload it to Secure File Pro.
6. If you are claiming Earned Income Credit, HOH or Child Tax Credit you need to provide proof that you have a right to claim those children or dependents. Proof can be a school record with child’s name and your home address, a doctor’s letter, a daycare letter, or other official document or letter. We cannot file for you until we have evidence.
7. When we have every required document, we will begin preparing your return.
8. We will call you for any further questions. We can also give you an official estimate of the cost of your tax preparation service.
9. You will be notified when your tax return is available for E-Filing.
10. You will sign your return with the Practitioner PIN method, where we remotely identify you by your photo ID and allow you to choose a PIN to sign your return.
11. Payment is due at the time of tax return signing. We accept debit, credit and refund transfer (bank product that is taken out of your refund).
12. You will be provided with a PDF of your 2019 tax return in your Secure File Pro account.
13. We will E-file your return. You will be responsible for making payments if you owe taxes. Your payment voucher will be included in the PDF of your tax return.
14. We will follow up with a review form asking you to rate our services on Google. If you have any problems, we kindly request that you contact us directly and give us an opportunity to help.