

# FIRST CHOICE TAX SERVICE - TAX YEAR 2023

As the New Year begins, the annual task of filing your income tax return once again arises. Please take a few minutes to read over the information provided below. We hope this will help to make the process as stress free as possible.

**\*\* A Checklist will need to be filled out and included in the package you provide us, noting any items you would like to discuss.**

*There are separate worksheets if you are self-employed or have rental income.*

Checklist & Worksheets can be picked up at our office 24/7, emailed per your request or retrieved from our website at [www.firstchoicetaxes.com](http://www.firstchoicetaxes.com)

Because of the sensitive material required to complete a tax return and in accordance with Accountant Guidelines we will **NO LONGER** receive information by **EMAIL**.

**\*\* We will ONLY be accepting documents and information in the following ways \*\***

**DROP OFF SERVICE: 9105 Atlee Road, Mechanicsville, VA 23116**

Our Drop Off Service is available 24/7. We provide plastic folders outside the door for you to place your paperwork in. There is a **LOCKED RED** Box to place the folder in.

**REQUEST A LINK TO A SECURE PORTAL TO UPLOAD DOCUMENTS: Send request to [sandy@firstchoicetaxes.com](mailto:sandy@firstchoicetaxes.com)**

**For clients who do require a meeting, please call to schedule an appointment as soon as possible, as our appointment calendar fills up fast. Be sure to bring your completed checklist/worksheets and ALL documents with you as it is likely you will not be able to schedule a second appointment. If you are not prepared to furnish the information during your appointment you will be asked to use our Drop-Off service once you have a complete package.**

The processing time for preparing and completing your tax return will be approx 7-10 business days from the date we have received "all" documents. *Information/Paperwork received after April 1st may require an Extension.*

**WE CANNOT EMPHASIZE ENOUGH:** Please review our checklist thoroughly so that you forward all the information required to complete your tax return at one time. Incomplete information or multiple packages will delay the completion of your tax return.

E-Filing is mandatory for returns prepared by a professional tax preparer, and we will need information from your VA driver's license to submit as proof of your identity. As we may have a copy from a previous year, many licenses have expired and we would like to update our files.

**\*\* Extremely important:** Please review the banking information that is being used for the direct deposit refund or payment withdrawal. Once the file has been executed within the e-file system, we cannot make any changes and it may result in a delay of receiving your refund. We will not accept bank account numbers over the telephone.

Once you receive your completed tax return package, we request that you review the package and immediately contact us with any questions or concerns. Upon receiving your approval, we will provide you the e-file authorization forms to sign. This is will be according to how your information was received: If your documents were sent virtually, an invoice for services rendered and forms will be sent electronically.

For those that need to pick up your paperwork the Lobby is open for pickups, payments and signing

**NO APPOINTMENT NECESSARY - HOURS for PICK-UP Monday, Wednesday & Friday 10AM - 6PM**

**Your Tax Return Will Not Be Filed Until Your Signed Authorization Forms Are In Our Office!**

*We are looking forward to being of service to you again this year. We wish you all the best for a happy, healthy and prosperous 2024.*

*Remember that if you have any questions relating to your taxes, we are here throughout the year to help you.*

*Sandy Blanton*