



Thank you for choosing Kirsch CPA Group!

How do I get started?

We strive to make preparing your Tax Return an easy process for you. Just follow the steps listed below:

1. **Read the Engagement Agreement** specifying our services and responsibilities to you.
2. **Complete the New Client Checklist.** This checklist provides the information we must receive to properly complete your tax return and look for tax-saving opportunities.
3. **Collect your tax documents.** (W-2, 1099, deductions, etc.)
4. **Send your completed checklist and tax documents to us via:**
 - o **Upload*** all your documents SECURELY to your portal at <https://kirschcpa.com/client-login/>
* To get started, email info@kirschcpa.com or call (513)858-6040 for registration information.
 - o **Mail or Drop off** to either the Hamilton or Oxford office. Original documents will be returned to you to keep in your records, Kirsch does not keep a copy.

Do you have a small business, rental property or farm? Organize all your income, expenses and deductions with a free checklist available on our website <https://kirschcpa.com/about/tax-forms/>.

What is next?

- Your information will be thoroughly reviewed, and your return completed. We will contact you if additional information is needed to complete your tax return. **Please note: Your checklist and tax documentation must be received before March 22, 2020.** If you have a tax document that is not available until after the deadline, please bring us all your other documents. Information received after the deadline may result in a rush fee to complete your returns by April 15, 2020 or extension.
- Your return will go through a detailed quality control process to insure accuracy and to identify all tax-saving opportunities.
- Your completed tax return will be sent to you through SafeSend.
SafeSend is a secure delivery system that makes it easier for you to review your tax return, make payments and return your signed forms. (Visit our [website](https://kirschcpa.com) for more information.)
- Securely review your tax return, electronically sign the e-file Signature Authorization (Form 8879) and if required print and mail paper filings. You can also make applicable IRS payments and pay your invoice all in SafeSend.
- Upon receipt of your Form 8879 and payment of your invoice, your income tax returns will be filed electronically. *Pay any outstanding tax to the IRS by April 15, 2019.*

If you have any questions, please call our office at (513)858-6040. We wish you success in 2020 and if we may be of any service to you, please let us know.

We look forward to providing you with outstanding service.

Sincerely,

Kirsch CPA Group