



Dear Client,

*It's tax time! As you plan to have your tax returns filed on time, please ensure you have collected all your tax records to avoid errors, processing delays, refund delays, or IRS letters. Use Kirsch's Client Checklist as a guide to gather your documents and visit the Kirsch Blog for the latest tax updates to ensure that your tax filing experience will go smoothly.*

### A Faster Way to Send Documents to Kirsch

TaxCaddy is a simple, collaborative platform that allows you to quickly and securely upload digital copies of your tax information to us. Simply scan or take a picture of your documents with your phone and upload it to TaxCaddy. Visit <https://kirschcpa.com/client-center/taxcaddy> to sign up and learn more.

Submitting your documents to Kirsch through TaxCaddy is the preferred method. Documents can also be sent to Kirsch through SafeSend Exchange: visit <https://www.kirschcpa.com> and click the blue "Secure File Upload" tab in the header. Or you can mail them to us at 2 S. 3rd Street, Suite 400, Hamilton, OH 45011.

### Kirsch Tax Preparation Process: What We Need from You

1. Log in to your account, either at [www.taxcaddy.com](http://www.taxcaddy.com) or the TaxCaddy app on your phone
2. Review the engagement agreement which specifies your responsibilities and the scope of our services
3. Fill out the Client Checklist
4. Upload all your documents and hit the "**DONE UPLOADING**" button
5. Our team will prepare your tax return and contact you with any questions
6. Your completed tax return, payment vouchers, and Kirsch invoice will be delivered to you via SafeSend
7. Review your tax return and sign the e-file authorization form (Form 8879)
8. Review and pay your Kirsch invoice for professional services
9. If applicable, pay all federal, state and school district taxes due
10. If applicable, print city/local tax returns, sign, and mail (with payment due, if required)

### Tax Returns Delivered to Your Email

Kirsch will use SafeSend Returns to deliver your tax return right to your inbox, allowing you to e-sign it, make payments to the IRS, and download a copy.

We appreciate your business and look forward to working with you. If you need additional accounting, payroll, or advisory support, or have any questions, please call us at (513) 858-6040 or email [info@kirschcpa.com](mailto:info@kirschcpa.com).

Stay Safe,

The Team at Kirsch CPA Group