

Scheduling Your Tax Appointment and Getting Organized

How to Schedule Your Appointment

- **Online Scheduling:** Appointments can be conveniently scheduled through our website at RCMTaxExpert.com.
- **Combined Business & Individual Appointments:** Please schedule a "Combined Business & Individual" appointment under the "business" category for corporations or partnerships needing returns prepared along with your individual return. This ensures sufficient time is allocated to address all your concerns.

Confirmation and Preparation Steps

- Once scheduled, you'll receive a confirmation email containing instructions on downloading Tax Organizers and the necessary steps to take before your appointment.
- Questions? Feel free to call us for assistance.

Tax Organizers for Tax Year 2023

- Organizers for Tax Year 2023 will be available in the "Public Documents" folder within your portal by January 20th.
- There will be specific Organizers for different entities: one for individuals and Single-Member LLCs and another for corporations, partnerships, and LLCs treated as such.
- Sole Proprietorships or Single-Member LLCs should use the individual Organizer, as their business income and expenses are reported on their individual return.

Completing the Organizers

- The Organizer includes generic business expenses applicable to all businesses and provides space for specific categories that might be unique to your business.
- Pay close attention to the questionnaire as your answers impact how your tax return will be prepared.
- Detailed information will help us advise you effectively and potentially save on taxes.

Additional Guidance for Organizers

- Think about transactions throughout the year that could positively impact your tax return and list them in the appropriate sections, even if you're unsure.
- Use Excel for calculations within the Organizer.
- Document all income sources, especially those without 1099 or W-2 forms.

Before your appointment, please ensure to upload the following documents via our secure portal:

- Personal identification (e.g., driver's license or state-issued photo ID).
- IRS Identity Theft Pin (if applicable).
- Important tax documents: W-2s, 1099s, K-1s, Unemployment 1099-Gs, etc.
- For Marketplace health insurance buyers: Form 1095-A is necessary.
- Various other documents depending on your situation (e.g., business statements, investment details, medical expenses, charitable contributions, etc.).
- Detailed guidelines are available on our website to comprehensively understand required documents.

Conclusion

Preparing for your tax appointment is crucial. Uploading the necessary documents beforehand ensures a smooth and effective tax consultation. For further information or assistance, visit our website or contact us directly. Remember, the more comprehensive your information, the better we can serve you and possibly optimize your tax situation.

Thank you for choosing RCM Tax Experts.