



Pro Tax Inc.
110 N Mahan St.
Ridgecrest, CA 93555

Tax Preparation Process

Dear Valued Client,

Pro Tax utilizes a hybrid appointment model to streamline your tax preparation experience. This process is designed to be more convenient, efficient, and secure while maintaining the high-quality service you expect from us. Below is an overview of our process:

- 1. Submit Your Documents:** Upload your tax documents securely through our online client portal or drop them off with our office staff. You are responsible for ensuring all required tax documents are provided to our office.
- 2. Initial Interview:** Our staff will contact you to verify your personal information (name, email, phone number, and address), ensure you are set up with a client portal, and confirm that we have received all necessary documents.
- 3. Tax Return Preparation:** Our team will prepare your tax return with precision. For more complicated returns, our enrolled agent will schedule an appointment with those clients who require a meeting after all documentation has been submitted and reviewed.
- 4. Review and Sign:** We will notify you via email and the client portal to review your tax return, provide your e-signature, and process payment for our services. Copies of your tax return will be available in digital form in the client portal. Printed copies of the tax return will only be provided upon request. There will be a \$10 printing fee, and an additional postage fee if mailed.
- 5. E-Filing:** Once your tax return is signed and our invoice is paid in full, we will electronically file your return with the IRS.

Turnaround Time: Once we have received all required tax documents, we will complete your tax return within 30 days. It is your responsibility to ensure all necessary documents are submitted completely and accurately. While our office will review the documents provided, failure to include all required information may result in an incorrect tax return, potentially leading to additional taxes, penalties, or fees from the IRS. Ultimately, the accuracy and completeness of your tax return depend on the documents you provide.



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This hybrid approach allows for greater flexibility and convenience, letting you manage much of the process from the comfort of your home. If you have any questions or need assistance with the client portal, please email our office at team@protaxinc.com.

Our office hours are Monday-Thursday from Noon – 5:00 pm for document drop off and pickup. Phone/email/virtual hours are Monday-Thursday from 9:00 am – 5:00 pm. To meet with one of our Enrolled Agents, appointments are required.

Please use the Pro Tax Office phone number and text number for official communications.

Office Phone # (760) 375-3222

Office Text # (760) 301-5558

Office Email: team@protaxinc.us

Thank you for your continued trust in us. We look forward to serving you with this improved process!

Best regards,
Amanda Bartel, CEO, Pro Tax Inc.
and the entire Pro Tax Team.