

ASSEMBLING A TAX RETURN

The first couple of pages to print are the signature forms. These **need** to be signed by **taxpayer** and **spouse** (if married) and by the **Preparer**.

1. Insert the appropriate business card in slotted pocket on left side of the green tax folder.
2. Place cover sheet (client "name" & "Tax Year") in front of folder.
3. Shred any "notes" or "messages" sheets, except for client mailing sheet. Check with preparer if unsure.
4. Mark 8879's and 8453's with a red x on signature lines and adhere a red "Sign & Return" flag to indicate where signature and date should be. (Seems like overkill but you'd be surprised) Paper clip a return HGA envelope to **preparer signed** 8879's and 8453's and invoice and place in left side of folder.
5. If 8867 in return draw line on bottom of page 4 for taxpayer and preparer signatures.
6. If the client has **estimated tax** payments or **payment vouchers**, paper clip pre addressed envelopes to the coupons and place in left side of folder behind HGA return envelope.
7. Place Refer-a-Friend sheet at back of left pocket.
8. Staple client's federal copy with cover letter attached. Staple state copy separately. Pull Mass 8453 from the back of the Mass return and staple to the front.
9. Put all misc. documents behind client copies of returns on right side of tax return folder
10. After they have been scanned (check tracking sheet), place client's original documents (from the green folder) in the blue file behind the client copies.
11. Check the red folder for any unused client documents and place behind all pages on the right side.
12. Keep the yellow folder with the Client tax return together (use an elastic).

Filing Copy – If *not* filing electronically

1. If the client has tax payments ("balance due" payment) to make with this return, remove the 3. Form 1040-V payment voucher page and cut out the voucher coupon. Set coupon aside.
2. Remove address sheets (federal and state); set aside – do not put in shred box.
3. Staple federal and state returns separately.
4. Put yellow "SIGN & Date" flags on the form where client signatures are required.
Put a small red "X" where client signatures and dates are required.
5. Prepare a mailing envelope for each return to be mailed. Use the preprinted address labels and insert in window envelope.
6. Paperclip the mailing envelope to the return, and include payment voucher if necessary
9. Place in left side of the green folder.

Double check for preparer signature on all pages for them to sign.

8879

8867 EIC form (if applicable)

8453 MA (and/or other states)

Letter

Client copies of the above

Mass return page 1

Privacy Policy

-Scan Client documents in green folder. Place all scanned documents and documents from red folder in tax document envelope. Envelope goes in back of right hand pocket.

-In Aero Template check off assembled and scanned.

-Call client for p/u or other method of delivery note this info on return

-Place assembled return in pick-up drawer.

Tax Return Assembly Cheat Sheet

Left Pocket

8879

8453

8867* (EIC)

7216 & eCollect forms*

Invoice

Payment voucher (balance due)*

Estimated Payment Vouchers*

Right Pocket

Federal return – letter, 8879, 1040, schedules

State return(s) MA form 1, schedules, 8453

Comparison Sheet

Other Info (privacy policy, worksheets, etc)

Client Documents (green & red folders)

*** If applicable – these will not be in every return**