

Hey, it's Siobhan here. This video is about our intake due date.

In the past we've had set intake due dates for businesses and for personal tax returns. We need all your information by this date to get you filed on time. Now, there have been some issues with that process that have created some backlogs and bottlenecks. So our goal is to create a more smooth running tax preparation process and for tax preparation to be completed in a more timely manner and a more consistent turnaround time. And so to do that, we're making some changes with our intake due date process.

We serve a lot of clients during tax season. This probably doesn't surprise you, but quite literally hundreds. And when we give everybody the same due date to give us their stuff, it creates bottlenecks in the process. Because here's the truth, y'all are great about turning in your stuff on time. We give you a due date, you get us stuff by then and we love that. We love that you're responsive to our systems and our timelines, and it's part of why we love working with you. It makes it for a really great working relationship.

But here's the reality of it on the inside that you may not know. If we say, Hey, we need all your tax information by March 8th, about half of you will provide your tax information within about three days of that date. The other half are spread out over the first six to eight weeks of the season, and then about half of you come in within about three days of that deadline. That's usually a hundred to 150 people at least. So you can imagine the bottlenecks in our internal systems at each stage of the process when we have half of our seasonal work showing up just within a couple of days. The intake process gets backlogged, the preparation, review, the final review, like the whole thing.

So we're really working to fix that to create a more smooth running tax preparation process and eliminate a bunch of those bottlenecks. The process that we're using is brand new this year. We are creating multiple staggered intake due dates. So different clients will have different due dates for providing all of your tax information to us. Now, this does create some complexity on our end for tracking who has which date. And we like to keep things simple unless we need that complexity. And this is a situation where I think we need that complexity because I think the end result will be a much more smooth flow for the tax season. That means a whole lot less stress for our team so they can provide better service and feel better doing it and more consistent and efficient timelines for preparing a return for our clients.

We have planned the intake due dates based on past tax seasons and patterns, meaning that we have not assigned due dates willy-nilly, totally at random. We've been strategic in planning intake due dates for our clients to create a smooth running process and season. You can always submit all of your info before the due date. We love early submissions, the more early submissions we have the easier our job is. That said, I totally get it. I'm deadline driven as well. Give a deadline and I'll meet it. But I'm not usually super early for deadlines and that's how a lot of us are, and that's fine. But that is exactly why we're creating the staggered due dates.

It's very important for you to know if we receive your tax information after your specific intake due date, it will be considered a late submission. That means we have two options. We can file an extension for you and reschedule your tax preparation for after the deadline, which means we would start work on

those returns in May. Or if you still need to be filed by the due date, we can charge our rush processing fee and prepare your return for on-time filing.

This applies even if you submit your information after your specified due date, but before someone else's specified due date. Here's the deal. Your due date is your due date. Theirs is not your due date. If we give everyone the option to extend to the very last due date we give to anyone, now we have one due date. It erases all of what we're trying to do here. Right? That makes sense. So look at your tax packet information carefully and our follow up emails as well. They will all be dated specific to your specific due date. Please just be aware of that. Heads up, pay attention and if your information comes into us after that due date, that's fine. We'll file an extension for you, reschedule your tax preparation for May or if you have a need for it on time, we can charge our 45% rush processing fee and do that for you.

If you receive your tax packet and the due date in there does not address a specific timeline need that you have, please just contact us, right away and we'll talk through it and figure it out together. So maybe we give you a due date and you're going to be out of the country and it's one of the earlier due dates and it's not really feasible to do it even earlier. Well, if that's the case, call us and we'll figure it out. Okay? We can be flexible if there's a specific situation that your intake due date doesn't work for you but I think, again, we've been pretty strategic in who is given what date with an intention of making it work well for people. But if there are any issues, just contact us. We'll sort it out. It's not a big deal.

So again, our goal in all of this is a smooth running tax preparation process, help reduce stress for our team in an already very intense season as well as create better flow of completion of projects so that you as our clients are getting your taxes prepared in a more timely manner and a more consistent timeline.

Once again, thank you so much for working with us on this. Watch the communications from us so that you know what your intake due date is. If you have any questions or concerns, then contact us.