

2018 TAX SEASON POLICIES

Please contact us when you have received *the majority* of your tax information. You may still drop off your information without an appointment; however, there may not be a tax professional available to review any questions you may have.

We highly recommend you do not submit sensitive information to us via e-mail. For your protection, we offer a secure file transfer tool on our website. This is a very easy, safe method for submitting your information. Please contact our office if you need assistance in using this file transfer. Visit our website at www.jgeorgecpa.com.

Your return cannot be started until an engagement letter is received, signed by both parties if a joint return. We will not require a deposit for preparing tax returns until March 23, 2019. Beginning March 23, 2019, we will require a \$150.00 deposit prior to starting a return.

Our fees are due at the time you pick up your returns or before they are sent to you via web portal. We accept cash, your personal check, and most major credit cards as a method of payment. We do not accept American Express.

We **DO NOT** disclose the results of your returns until our fees are paid in full.

If someone other than you or your spouse is picking up your returns on your behalf, they must be prepared to show proof of identification.

We retain copies of your returns and some of your supporting data for a period of three years. After three years, our records are shredded by a bonded outside contractor. We recommend you keep copies of your income tax returns indefinitely. The supporting data for your taxes may be destroyed after seven years.

Copies of your previous three years' returns can be obtained **for a fee** of \$25.00 per year.

Hours beginning late January 2019, M-W-F, 8:00 to 5:00, T-TH 8:00 – 8:00, SAT 8:00 to 12
Phone: 301-473-4445 Email: frontdesk@jgeorgecpa.com