ALT TAX & FINANCIAL SERVICES, INC.
1101 JOLIET STREET
JANESVILLE, WI 53546-6202
(608) 756-5919

CLIENT EXPECTATIONS

When you choose Alt Tax & Financial Services, Inc. for your 2019 income tax preparation, you can expect to receive a complete and accurate tax return as well as a professional environment to address your tax questions and financial concerns. We would like to explain our normal steps in the preparation of tax returns in our office.

First of all, we prepare most tax returns by appointment. We try to pre-schedule prior year clients on or about the same time and day as their appointment was last year. Sometimes, because of circumstances beyond our control, appointments may be slightly different from what the client had the year before. If this is the case, we welcome a phone call from you to schedule a better day and/or time. Anyone who has not been to Alt Tax & Financial Services, Inc. in the prior tax year may call and make an appointment that works best with their schedule. This coming year we will have eight tax professionals working a wide variety of days and hours to meet the schedules of our clients.

Our tax interview appointments are generally ½ to 1 hour long depending on the individual tax circumstances of the client. At the tax interview appointment, which is in a private closed-door office, your tax professional will go through the tax information and receipts that you provide. It is our expectation that our clients will fill out as much as possible of our tax organizers, checklists, and worksheets that are mailed to them. This helps save time and helps the client and preparer from overlooking any deductions or credits for their income tax return. At your tax appointment, your tax professional may be able to give you a “rough” idea of your income tax results (i.e.: a refund or a balance due) if time permits. Please keep in mind that this “rough” idea is just an estimate and that your actual final tax results may be different.

Your Income Tax Returns are not completed at the time of your Tax Interview Appointment.

After meeting with you, your tax professional will review the information you provided and complete the preparation of your tax return. If you have all the needed information at the time of your tax interview appointment, we will **Guarantee** that your tax return will be completed and ready for you to sign and pick up in one week. If you are missing information at the time of your appointment, we will ask you to call in or drop off that information. In that situation, we will call you when your tax return is completed and ready for you to sign and pick up. This will **Generally** be in about a week from the time you call in or drop off your additional tax information.

When a tax return is completed by your preparer, it is checked and processed to get it ready for your signing and for E-Filing. We file all eligible returns electronically with the Internal Revenue Service and most State Tax Departments. We **do not** do the costly Refund Anticipation Loans or any of the Bank Products. When you come in to sign and pick up your completed tax return, you will generally have just one form to sign. We will give you back a complete paper copy of the original tax return, your tax receipts, and information on how to check the status of your refunds. Our tax preparation fee will also be taken care of at this time.

Tax Returns are then E-filed every evening. We do keep a copy of your tax return here at Alt Tax & Financial Services, Inc. We will verify that your return was received by the IRS and State. You will have nothing further to do but wait for your refund or send in your payment if a balance is due.

It does not end there. We are here year-round for your tax, financial and related questions. Our companion business, Alt Financial Services, Inc., offers investments and other financial products year-round. Please call us any time if we can be of help to you.

Sincerely,

Dennis C. Alt, EA

Dennis C. Alt, EA
Licensed to Represent Taxpayers Before the IRS