



2025 Tax Filing Season - *How To...*

Hello and Happy 2025!!

Below please read the process for working together this year. I am confident that following these steps will make for a more efficient and better experience for everybody.

So, here we go.....

- **Step 1:** Review the [checklist](#) and [fee schedule](#) for your category of tax return (attached). (If you need, I can send you a personalized organizer with your 2023 numbers upon request).
- **Step 2:** Gather **100% of the documents** that you will need to have your tax work completed. (I can send you an organizer with your 2023 numbers upon request).
- **Step 3:** Send those documents to me. You can upload into [Liscio](#), send by fax, or mail. **Please DO NOT email tax documents to me.**
- **Step 4: Email** or call me (leave voicemail if I don't answer) and let me know that you are **ready** to start (and that you have shared **all** your tax documents).
- **Step 5:** Once I've heard from you that you are ready, I will send the **engagement agreement** in [DocuSign](#).
- **Step 6:** It is the **completed engagement agreement that gets you onto my to-do list**, which I will complete first-in-first-out.
- **Step 7:** I **prepare** your taxes and then send the finished work to you in [Liscio](#).
- **Step 8:** You **review** the returns. If you don't have any questions, you would sign the e-file authorization forms (or request them for digital signature) and then I'll file. If you have questions, you can ask in [Liscio](#) or request a Zoom-type meeting to go through the returns together.

On the next page, I'll provide some more detail about each step. Thanks 😊



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Professional Tax & Business Services

- RE: Step 1:** Not everything on the checklist will apply to everybody. Please read it for its relevance to your tax situation (You rent? I don't need mortgage info, for example)
- RE: Step 2:** It will really help efficiency if you upload everything at the same time. In some cases, though, there may be a document that you know will arrive well after the others (Schedule K-1, for example). In that case, please gather everything except the missing document and provide a conservative estimate of what to expect in that document, let me know it's an estimate, and then keep moving in the process.
- RE: Step 3:** **Please DO NOT email sensitive tax information to me.** Using Liscio is the safest option available. If you prefer, you can:
- Fax: (888) 499-2609
- Mail: Contact me separately if you'd like to mail your tax papers.
- RE: Step 4:** My email is dave@fortunatfields.com. My phone number is still (619) 220-0375. You can email or call 24/7. I turn my phone off when I'm not at work.
- RE: Step 5:** Please follow the prompts in DocuSign to sign the engagement agreement. If you are filing with your spouse, you will each have your own places to check and sign. Please just complete your own engagement and let your spouse complete his/hers. When we have all signed, DocuSign will send an email to us all to say the document is complete.
- RE: Step 6:** I get the same email that you do, that says the DocuSign is complete. My in-box becomes my to-do list.
- RE: Step 8:** I'd be delighted to walk you through your return and answer your questions. When you have the tax work in hand, please then schedule a time to meet. I ask that you suggest two specific dates/times that work well for you, keeping in mind that I'm 8 hours ahead of California, 5 ahead of New York. I am willing to do a call/meeting as early as 6:00 am and as late as 9 pm (Portugal time).

Thank you for your cooperation!

*I am confident that this 8-step process will be more efficient and effective for everybody.
Thank you as always for trusting Fortunate Fields, Inc to crunch your numbers!*

*Fortunate Fields, Inc
Tel: (619) 220-0375 (+8 hours from CA)
Fax: (888) 499-2609
www.fortunatfields.com*