

# *Crawford, Merritt and Company*

*Certified Public Accountants*

## **Completing your Returns**

### **Providing Information**

You can provide us with your tax information through [Smartvault](#) (a bank level, online portal system), drop off \*, mail \* or otherwise. You will first need an invitation to Smartvault, e-mail [Dubey \(dubey@cmccpas.com\)](mailto:dubey@cmccpas.com) if you haven't used it before. The Smartvault login or password reset link is: [cmccpas.com](http://cmccpas.com)

Please include a phone contact number with your information.

### **Processing returns**

We process returns on a first-in, first-out basis. We input your information as it comes in. Initial processing of your tax documents takes an average of 7 days. There may be additional processing time if additional information is needed from you.

Once you have provided all of your tax documents to us, please notify us so we can complete processing. We won't know your tax return results (refund or owed amounts) until we have completed your tax returns.

We will contact you via e-mail or phone to request additional information, verify information or request information that we feel may benefit you. We process additional information as quickly as possible.

### **Completing Returns**

Once all information is input and reviewed, we will upload your tax returns to Smartvault and you will be notified by a Smartvault e-mail that the returns are in Smartvault.\* Please review your tax returns and verify SSN, date of births, addresses, dependents, direct deposit (routing & account #) information and all other information. Please let us know if no additional changes or corrections are needed. We will proceed to finalizing your returns. Once no more changes are needed to your tax returns, the returns in Smartvault are for your records. You should not mail returns to the IRS or Georgia as this could cause duplications.

### **E-file Authorization forms**

We will e-mail e-file authorization forms (8879 & GA-8453) to you through DocuSign for your electronic signatures. These forms give us permission to e-file your returns with the IRS and State. For joint returns, an e-mail will be sent first to the spouse as listed on the return. Once the spouse signs the document, it is automatically e-mailed to the taxpayer. After the taxpayer signs the document, the document is automatically sent back to us.

### **Invoice**

We will e-mail you an invoice for our services. We accept online payments, checks or cash.

### **Confirmation of Acceptance**

We e-file all tax returns within two days of receipt of the signed e-file authorization forms and payment for our services. Once your returns are accepted, a confirmation will be placed in Smartvault for your records.

\*If you drop off or mail us your documents, we will send your completed tax returns, documents, e-file authorization forms and invoice to you via Standard USPS mail unless you request otherwise to pick up or have your returns uploaded to Smartvault. Let us know otherwise when you provide us with your information.