



## How to Work with Us Remotely

Having your tax return prepared by our firm does not require a face-to-face appointment or an in-person exchange of physical documents. The entire process can be accomplished remotely from your personal computer via Zoom or with a phone call.

### **Step 1: Initiate the process**

To begin, visit <https://jlwennescpas.com/> and complete the following:

**E-Sign an Engagement Letter:** To electronically sign your engagement letter for tax preparation services, go to the Engagement Letter section of the Client Resource page and select the appropriate engagement letter type.

**Upload Your Tax Documents.** To securely upload your tax documents using our secure portal, visit <https://jlwennescpas.com/secure-client-portal/> Enter your email address and password. If you do not know your password, press “Forgot Password?” and it will prompt you to reset.

Once these two steps are complete, you will be placed into our queue and the tax return process will begin. Please note our firm will not start your return until we have received all of your tax documents.

### **Step 2: Tax Preparation**

The assigned CPA will review your information and will contact you by phone or email with any questions. If necessary, a zoom meeting or phone call will be scheduled.

Upon completion, our office will contact you to communicate the result and provide a description of the next steps.

### **Step 3 Electronic delivery:**

Once payment is taken care of; we will upload a copy of your return to our secure portal for review. You will also receive an email from DocuSign for electronic signatures. Once you have reviewed your return and sign, we will file your return.

That’s it! If you have any questions about the process, please feel free to contact our office. Thank you and we look forward to working with you.