

## What To Expect In The Tax Interview

- If you bring all of the items listed in the "What to Bring" section, and have it organized, your interview and tax preparation should take about 45 minutes to one hour.
- During the interview we will ask you dozens of questions. The purpose of our questions is to: Obtain all of this year's required information; obtain additional deductions that you may have overlooked; give you some tax planning ideas for next year; and answer any questions you may have.
- We may not be able to finish your return during the interview if we do not have all of the necessary information. In that case we will ask you to clarify or provide additional information, or to provide us with permission to contact other parties who can provide us with the information needed regarding your tax return, such as brokers or bankers.
- If we do the research and gather the needed information to complete your tax return we will have to charge you for the extra time.
- To prevent extra charges and delays for the completion of your return; you can drop off your tax information to us. We will start on your return, then call you when it is complete to come in for a short interview to review your return (usually within 10 to 14 business days).