

# What to Expect



**GUARDIAN**  
FINANCIAL GROUP

What to expect on the path to tax preparation.

START  
HERE

## 01 Submit documents

Drop off your documents to our office or upload them to our secure portal, SmartVault.

## 02 Begin your return

We start your file and digitize your documents so you have easy access to them through our portal anytime you need them.

## 03 Draft return

Our staff accountants crunch the numbers. Your tax preparer reviews your return to maximize savings.

## 04 Review and sign

Review and sign your electronic tax return. Schedule a review appointment online. Pay your preparation fee.



## 05 Return filed with IRS

Once we receive your signature and payment, we'll submit your return to the IRS for processing.

## 06 Receive your refund\*

If you have a refund, you can expect to receive it within 3 weeks.\*\*



trust **GFG**.com

## All the details



### Want to save a trip to our office?

Upload your documents to our secure document portal, SmartVault. Scan the QR code to open the login page. First time users can request an invitation from our office.

*Remember to let us know when all of your documents are uploaded so we can start working on your return.*

### Scheduling made easy

When your return is ready to review and sign, you'll receive an email notification that includes a link to schedule a review appointment with your tax preparer. We've made it easy to schedule a time that works for you, without having to make a call. A half hour review appointment is included with every tax return we prepare so you're confident that you understand your return before it's filed.

### We've gone digital!

To save paper (and time!), our default is to request all signatures digitally. When your tax return is ready to review and sign, we'll send you an e-signature request through email. You can review your tax return before you sign. Once you are ready, you can electronically sign your tax return.

### Getting ready to file

Before we file your return, we must have your signature. The faster you sign, the faster we can file! To avoid any other delays, make sure to make payment arrangements with us. We won't be able to file until your invoice is paid.



### Still have questions? We're here to help

Connect with us so you feel prepared to get started. You can reach us at 509-582-2047 or via email at [info@trustgfg.com](mailto:info@trustgfg.com).

\*Not everyone will receive a refund. Tax liability and refunds are determined on an individual basis and depend on individual circumstances and income.

\*\*The fastest way to receive your refund is through direct deposit; check refunds may take up to six (6) weeks to issue. You can check your refund status at [IRS.Gov/Refunds](https://www.irs.gov/Refunds). If you have questions about your completed return or your taxable income, your tax preparer can help.



[info@trustgfg.com](mailto:info@trustgfg.com)



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