



Our 10 Step Tax Preparation Process

Additional quick links to key documents and resources can be found within our website's [Resource Center](#).

Step 1 - Review Your Kick-Off Email

Now that you are here, you are already well on your way! You've read your kick-off email from your Tax Concierge. **Make sure to notate your Documents Due to BlueSky Date.** This is very important to ensure the timely filing of your return. We estimate that if all documentation is received by that day, your return will be ready for your review by the **Ready for your Review Date** in your kick-off email. This date is only an approximation, and the timelines could vary, but getting all of the documentation in by the due date is key.

If we have not received the majority of your tax documents by the **Documents Due to BlueSky Date**, we will put your tax return on extension. We will use your 2023 tax projection to calculate the anticipated liabilities. We cannot guarantee this will cover your liabilities as it is an estimate. There may be penalties and interest if the amount paid with the extension is lower than the actual amount due when filing.

Also, take note of the special messages in your kick-off email about Photo IDs and verifying your bank account information. These are additional key pieces that could cause filing delays even once the return is ready.

Step 2 - Review Our "Engagement Letter"

Please read our [2023 Tax Return Engagement Letter](#).

After reading this letter, please contact your Tax Concierge immediately if you wish to disengage from our Tax Return Preparation Services.

Step 3 - Review Our "Tax Return Price Notice"

Please read our [2023 Tax Return Price Notice](#).

Please note that we are unable to provide an estimate on the cost of your return until it is complete. We provide tax preparation services to add value to your tax planning and be a one-stop hub for your financial journey. Based on our research, our tax preparation fees are slightly under fair market value.



Step 4 - Upload Your Documents

It's time to start uploading your documents!

In your kick-off email, you will find a link to upload your tax documents.

*If we are preparing multiple returns for you, **please be mindful of your Documents Due to BlueSky Date and links for uploading your documents.***

Complete this [online questionnaire](#) that is included in your kick-off email for each return.

*If you'd prefer a more comprehensive checklist to help you gather your tax documents, please check out the **Tax Checklists** section at the bottom of our [Tax Preparation webpage](#). It contains a variety of detailed checklists to help you gather your documentation. If you are unsure which checklists apply to you, please get in touch with your Tax Concierge.*

Step 5 - Confirm You're Ready & We'll Get To Work!

*At BlueSky, we love to get a jump on things! If you upload all of your tax documents before your **Documents Due to BlueSky Date**, contact your Tax Concierge, and we will get your return started early!*

Your hard work is almost done. Now, it's BlueSky's turn.

Step 6 - Review Your Return

A member of your advisory team will reach out to have you review and approve the return. Please keep an eye out for this email from your advisor.

Step 7 - Electronically Sign & Submit Your Returns

After you have approved the return, your Tax Concierge will send you the appropriate forms through the tax preparation software for your signature. We will file the returns once you have signed.

Times can vary on how long it takes the various agencies to accept returns. Once all your returns have been accepted, your Tax Concierge will send you a final email confirming their acceptance and a PDF copy of your return will remain filed in your client portal in the Taxes > 2023 folder.

*In this last email, you will also receive a **brief survey** about your experience with this year's tax process. **We value your feedback as we continually improve for YOU.***



Step 8 - Submit BlueSky Survey & Payment For Services

Invoices for BlueSky's tax preparation services will be sent out approximately 5-10 business days after your return has been accepted.

In the meantime, please take a few minutes to complete the survey previously sent to you by your Tax Concierge.

Step 9 - Submit Estimated Tax Payments (if applicable)

If your Advisory Team has suggested that you make estimated tax payments for 2024, please navigate to the official tax payment website for the IRS (Federal tax payments) or the applicable state or local government.

Step 10 - Congratulations! You Survived Tax Season.

Pat yourself on the back for a job well done!

Your BlueSky team stands by your side as tax questions come up throughout the year.