



# BIZ FACTS

## ABOUT YOUR TAXES



## 2024 TAX FORMS TO COMPLETE

### FORMS FOR YOUR 2024 TAX PREPARATION:

Initial questions we need answered from you will be outlined in our **Web-Enabled Questionnaires**. These questionnaires are designed to guide you through a series of questions to help us ensure we have correct and accurate information to provide you with the best possible tax outcome.

### STEP #1: ENSURE YOU ARE TAX READY

→ Before you begin this process, please review the Tax Ready guide we have prepared. It is best to have as much of your information gathered as possible prior to completing your 2024 Tax Questionnaires.

→ 2024 Tax Ready Guide: [CLICK HERE TO VIEW - TAX READY GUIDE](#)

### STEP #2 – COMPLETE THE APPROPRIATE QUESTIONNAIRE:

→ Each questionnaire will answer to questions we have automatically once you click **SUBMIT**. At the end of each questionnaire, you will be prompted to check your email for an Invitation link from TaxCaddy to upload your information.

→ NOTE: Be sure to **SUBMIT** your answers **BEFORE** you upload so you do not lose the information you have answered on each respective questionnaire.

#### WHAT QUESTIONNAIRE DO I CHOOSE?

- **PERSONAL INFO:** All personal tax return clients will complete the [2024 Personal Tax Questionnaire](#)
- **BUSINESS INFO:** Two forms need to be completed for EACH business return. The [2024 Business Tax Questionnaire](#) and the [2024 Business Auto & Home Office Questionnaire](#).
- **RENTAL INFO:** Clients with rental properties will need to complete the [2024 Rental Property Questionnaire](#).

### STEP #3 – YOUR SUBMITTED ANSWERS AND UPLOADS WILL BE PLACED IN QUEUE:

→ After you Submit and upload your documents, your information will be placed in queue to begin preparing your 2024 taxes.

→ Your answers and documents will be processed by our staff and then we will reach out to you to set up a meeting to discuss your information and additional items that might be needed.

### DO YOU HAVE A TAX FILING DATE REQUEST?

→ If you need to have your tax returns completed and filed by a specific target date, please reach out to us **AS SOON AS POSSIBLE** to discuss placing you in the queue.

→ Please understand we will do everything possible to meet filing requests, however we may have a capacity limit as we approach certain deadlines.