



## Tax Preparation Engagement Procedures

### Pre-Engagement

Talk to our professional  
Email, phone call or Wechat  
Confirm the scope of the service  
Pricing and term agreement



### Information Gathering

Prior-year tax returns of  
your family and business  
Schedules and Statements  
Financial data collection  
Applicable states



Support documents can be sent to us  
via email or upload to online portal  
or mail attention to MyAdvisor360 LLC  
1775 Tysons Blvd Ste 500  
McLean, VA 22102



### Tax Return Review

Review the draft  
Walk-through with our professional  
Make any revision, adjustment, or  
modification



### Onboarding

Engagement letter  
Client portal access  
Client tax organizer  
Preferred communication way  
(email, phone call or Zoom)



### Draft

Identify additional deductions or tax credits  
Issue spotting any missing or conflicting info  
Once all the info are ready  
We start working on the draft



### Filing

Approval and filing on behalf of client  
eFile or paper file  
Electronic tax payments  
Filing confirmation  
Invoice payment

Kindly give our professionals a  
review to support our hard working



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