

Option	Description	Best for:
Express Drop Off	Drop off documents any time 24/7, using our secure drop box. Returns typically completed within 14 days.	<ul style="list-style-type: none"> • Returning clients with few changes from prior year • New Clients with relatively straight forward tax returns • Small business clients with good books and records • Clients who don't want to wait for an appointment
Secure Online Portal Upload	Upload anytime 24/7 to our secure online client portal. Returns typically completed within 14 days.	<ul style="list-style-type: none"> • Clients who are comfortable uploading/downloading documents • Clients that are not near our office • Clients that are not available during regular business hours • Clients that don't want to wait for an appointment
15 Minute Client Intake Appointment	A brief meeting with a Tax Advisor to discuss/review tax situation. Returns typically completed within 7 days.	<ul style="list-style-type: none"> • Clients with a few questions or significant changes from prior year • Clients with more complex tax situations
1 Hour Tax Return Consultation	In depth meeting with Tax Advisor to discuss/review tax situation and options. Return typically completed the same day.	<ul style="list-style-type: none"> • Clients with complicated tax returns or scenarios • Profitable businesses with newly acquired assets