

GETTING STARTED

Our 5 step process for working with us



1

Fill out our New Client Intake Form

2

Upload your tax documents through our secure portal located in the bottom of our website

3

Schedule your phone interview with one of our tax experts

4

Once completed one of our tax experts will call to go over your return with you & email you a copy before filing

5

Sign our Engagement Letter Packet & submit payment so we can e-file & process your return

Don't forget to schedule your tax appointment for next year!

www.rosemarysaccountingsolutions.com