



Virtual Tax Preparation Instructions

Many of our clients are very busy and can't find the time to sit and wait in a tax office for hours; or may possibly have physical limitations restricting their ability to come directly into our office. For this reason and more, BFVS offers Nation Wide Virtual Tax Preparation saving our clients time & the hassle of struggling with tax season. Whatever your preference, we look forward to serving you!

INSTRUCTIONS FOR VIRTUAL TAX PREP:

1. Submit Required Documents: (*See options below on the different methods you can use to submit your documents.)
 - Copies of Valid State Issued Photo ID for the Taxpayer.
 - Copies of Social Security Cards for ALL taxpayers and dependents.
 - Forms W2's, 1099's, and all other relevant Income documents/information.
 - Proof of Expenses
 - Proof of Residency of Dependents who are eligible for the Earned Income Credit.
 - Any other documents necessary to prepare an accurate return.
 - Voided check for Direct Deposit (if applicable)
 - Copy of Last Year's tax return, if available.
 - Completed Client Application Form
 - Signed Virtual Tax Preparation Authorization Form
2. We will confirm receipt of your documents and begin to prepare your tax return. We will contact you if we need additional information or with any questions. Review copies will emailed to you for your approval and electronic signature(s).
3. Payment is due in full before processing your final return. (**See options below on the payment methods available.)
4. Once we receive your electronic signature authorization, we will submit your return to the IRS and send you a link to download your final tax file for your records. (For your security we do not store copies of your tax returns in your Client Portals online, but you may contact our office if additional copies are required.) If you prefer, you can contact our office to request your final copies to be printed and mailed to you for an additional minimum fee of \$15.

Please contact us with additional questions.





***How To Submit Your Documents**

- 1) Upload your documents through our secured online Client Portal <https://bfvisionarysolutions.weebly.com/upload-documents.html>
- 2) Scan and email your documents to info@bfvs.org. (Be sure to include taxpayers name and last 4 digits of Social Security number.)
- 3) Fax your documents to us at (888) 489-9840.
- 4) Mail documents to: (This is a mailing address ONLY)
BFVS Taxes
9119 Ridge Rd, Unit 14
New Port Richey, FL 34654

****Invoice Payment Options Available**

- 1) Pay Online via PayPal Debit, Credit on our website: <https://bfvisionarysolutions.weebly.com/payment-options.html>
- 2) Request a link to be texted or emailed to you to pay with Visa, MasterCard or American Express.
- 3) We can accept various payment methods through other Third-Party bank and software apps, however you must agree to their Terms and Conditions and Security Policies. Some examples are Bank Pay To Email or Phone, Square, CashApp, Venmo, Zelle, Google Pay, FaceBook Messenger Pay, Dwolla, etc. Please notify our office if you prefer one of these or another alternative payment method BEFORE submitting payment to make sure our office can accept this method. We are NOT responsible for unauthorized payments sent.
- 4) Mail Check or Money Order to: (This is a mailing address ONLY)
Be sure to include taxpayers name and last 4 digits of Social Security number on check.

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