

Your Business Tax Returns



Thank you for choosing Joel I. Levy, CPA, PLLC for your accounting needs!

We communicate primarily with e-mail and utilize a web portal we call "Joel's Tax Vault" to share documents with you securely. **Please make sure we have a current e-mail address for your company. We will also need up-to-date banking information if you would like tax payments to be drafted automatically.** Here is what to expect once you've submitted your tax documents:

1. We will contact you if we have questions or are missing any information.
2. When we have completed your returns, we will upload the drafts to your Tax Vault, and you will receive an e-mail notification.
3. Please sign in to Joel's Tax Vault and review your returns. Feel free to contact us with any questions or concerns.
4. When you are ready to file, **print and sign the Engagement Letter and Form 8879.** These forms should be in the Tax Vault on pages 2, 3 and 5 of your federal return. You can mail, e-mail, upload, or fax the signed forms to us.
5. As soon as we have your signed Engagement Letter and Form 8879, we will e-file your tax returns.
6. You will receive e-mails letting you know the IRS and state(s) have accepted of your returns. This can take a few days.
7. You will receive an e-mail letting you know your Final returns have been uploaded to the Tax Vault. You can log in to look at, save, or print the returns at any time.
8. If you owe federal or state taxes or are making estimated tax payments, you must pay by the due date to avoid penalties. If you did not have us set up automatic drafts, you can pay online (IRS: www.irs.gov/payments ; NC: www.dor.state.nc.us) or print payment vouchers from the Tax Vault and mail checks.
9. **NEW THIS YEAR • We encourage you to file and pay your annual report online at www.sosnc.gov.**

Terms to Know

JOEL'S TAX VAULT • This is a secure web portal where we will post your returns. You can log in at www.jilcpnc.net. If you have trouble logging in, click on "Forgot password?" and "reset via email".

FORM 8879 • This gives us permission to e-file your return.

ENGAGEMENT LETTER • This outlines the services we are providing and notes that you are ultimately responsible for providing accurate information to us.