

Your Individual 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 you and your spouse, if applicable. 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 documents. You can upload documents to the Tax Vault or use mail, e-mail, or fax. **New this year, we will need a copy of your and your spouse’s (if applicable), Driver License.** North Carolina now requires this information to help prevent identity theft.
2. When we have completed your returns, we will upload the drafts to the Tax Vault.
3. You will receive an e-mail letting you know your returns have been uploaded. Please sign in to Joel’s Tax Vault and review your returns. Feel free to contact us with any questions or concerns.
4. At almost the same time, you (and your spouse, if applicable) will receive an e-mail titled “Tax Year 20xx Documents to Sign”. This will contain a link that will allow you to e-sign two documents: Form 8879 and our Engagement Letter. You will be able to review your Federal return, but you will NOT see your NC return. **Do not e-sign these documents until you have reviewed ALL of your returns in the Tax Vault and are ready to file.** If you are married, filing jointly, each of you must sign Form 8879. Only one of you needs to sign the Engagement Letter.
5. As soon as you sign the 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 your returns. This can take a few days.
7. You will receive an e-mail letting you know your Final returns have been posted 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. If you gave us original documents, we will scan them and mail them back to you. This step can take some time. Please let us know if you need your documents back quickly.

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”. **Tax Vault notification e-mails will be sent ONLY to the taxpayer listed first on the return.**

E-SIGN • You will click on a link in an e-mail and be asked a series of questions gleaned from your credit report. This will verify your identity and allow you to electronically sign the documents we need.

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.