MNG BUSINESS SOLUTIONS

Tax Preparation Client Guide

“The Financial Housekeepers”

How to file your taxes with us using the free TaxesToGo app — simple, secure, and step by step.

Welcome! We are glad you are here. You do not need to come to the office to get started. With the TaxesToGo app on your phone, you can send us your information and documents safely from home. This guide walks you through each step in plain language.

How it works — step by step

1 Start on our website

Click **“File Now”** on **mngbs.com**. You will be taken to our TaxesToGo signup page. Enter your name, email, and mobile number, and you will receive a text with a link to download the free **TaxesToGo app** (iPhone and Android).

2 Enter your information in the app

In the app, enter your personal information — you can scan your driver’s license to fill it in automatically. Photograph each of your tax documents when prompted, and take a selfie for identity verification. Review everything and submit.

3 Email your preparer

The app will give you a **Tax Number**. Email that number along with your **last name** to your preparer so they can pull up your return. Use the subject line: **TaxesToGo submission — [Your Last Name], [Tax Number]**. See the preparer list below.

4 We prepare your return

Your preparer reviews your documents and prepares your return. If anything else is needed, your preparer will let you know.

5 Review appointment

Your preparer holds your review appointment — by phone, video, or in person — and walks you through your adjusted gross income (AGI) and your refund or balance due.

Your TaxesToGo signup link:

https://taxestogo.com/App/Download/71243

You will also reach this link by clicking “File Now” on mngbs.com.

6 **Payment**

Your invoice is due at the review appointment, before you sign and we file. Pay it at the appointment, or choose to have your fee taken out of your refund — see “How will you pay your tax prep fee?” on page 3.

7 **Sign in the app**

Once your payment choice is settled, you will be notified in the TaxesToGo app to review your return and sign electronically — right in the app.

8 **We file**

Your return is filed only after your payment is settled — paid, or set up to be deducted from your refund — and you have signed.

9 **Your records**

You will receive your tax records by email in a password-protected file for your records.

Email your Tax Number to your preparer

Michelle	info@mngbs.com
Rodrion Pitts	rodrion.pitts@mngbs.com
Mallory Lindsey	mallory.lindsey@mngbs.com

Please email your Tax Number and last name to the preparer you chose. Use the subject line: TaxesToGo submission — [Your Last Name], [Tax Number].

What to have ready

Photograph these in the app if they apply to you. Having everything ready helps us prepare an accurate return and meet your deadline.

- ✓ **W-2s**
  From every job
- ✓ **1099s**
  1099-NEC, 1099-MISC, 1099-INT, 1099-DIV, 1099-R, SSA-1099
- ✓ **Last year’s return**
  If you are a new client
- ✓ **Mortgage interest statement**
- ✓ **Property tax records**
- ✓ **Charitable donation receipts**
- ✓ **Childcare provider info**
  Name, address, and tax ID if available
- ✓ **Education expenses**
  Form 1098-T
- ✓ **HSA / IRA records**
  Contribution records
- ✓ **Business records**
  If self-employed — income and expenses
- ✓ **IRS letters or notices**
  Any letters you received
- ✓ **Photo ID**
  Driver’s license or state ID — you will scan it in the app

Prefer to come to the office?

In-person appointments — with Michelle

In-person appointments are available with Michelle at **7020 W Florissant Ave, St. Louis, MO 63136**. Please note: this address is for Michelle's appointments only. If your preparer is Rodrion Pitts or Mallory Lindsey, please ask them about your appointment location and options.

How will you pay your tax prep fee?

Prior-year returns — fee due up front: If your return is for a prior tax year (back-year taxes, not the current year), your tax prep fee must be paid up front — before your preparer finishes preparing your return. There is no pay-from-refund option for prior-year returns.

At your review appointment, tell your preparer which option you prefer:

Option A — Pay up front

Pay your invoice at your review appointment, before you sign and we file.

Option B — Out of your refund

Have your tax prep fee taken out of your refund instead of paying up front.

If you choose Option B, please know: this has to go through the bank. It requires the bank's approval, and the bank charges its own additional fees **on top of** your tax prep fee. All of the fees are deducted from whichever refund processes first — your state refund or your federal refund. If the total fees are more than your state refund, the rest comes out of your federal refund.

Your preparer may also ask you to call the IRS offset line together on a three-way call, to make sure you do not have any IRS debts that would reduce your refund.

Payment terms — please read

- Your invoice is due at your review appointment, before you sign and we file. Choosing Option B above is the alternative to paying up front at that appointment.
- Once your return is prepared, the tax preparation fee is owed in full — whether you file, change your mind, or file elsewhere.
- Work outside standard tax preparation is a separate service with additional fees.
- Tax preparation does not include bookkeeping. Bookkeeping requires a consultation before work begins and carries separate fees.
- When approaching a deadline, submit a complete package of all applicable documents. An incomplete package risks missing the deadline.

Security: Keep your information safe

Never send sensitive tax information, IDs, Social Security numbers, banking information, or complete returns through unsecured email. Use the TaxesToGo app for all documents — it is the safe way to send them to us.

Tip we recommend: Get an IRS.gov account

Set up a free online account at **IRS.gov**. With your account, you can see IRS letters there first, view and pay any balances, and set up payment plans. It is a simple way to stay on top of everything with the IRS.

Questions?

Contact your preparer, or email us at **info@mngbs.com**. For current pricing, please see **mngbs.com**.

MNG Business Solutions
“The Financial Housekeepers”
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St. Louis, MO 63136

Email
info@mngbs.com

Start here
mngbs.com
Click “File Now”

Thank you for trusting MNG Business Solutions with your taxes. We look forward to working with you.