Our Tax Process

Step One: Data Collection & Intake Interview

- Face to Face - Stop in our office at your convenience. Plan for a 15-20 minute intake interview where we verify your information, go through a checklist to make sure you have everything, and schedule an appointment with your Tax Professional for a comprehensive review and signing of your return.*

- Express Drop - Use the Express Drop station in our lobby. You will place all your tax documents in an envelope, sign the General Engagement & Consent forms, fill out your preferred contact information, and place the envelope in our secure, locked Drop Box. No waiting. Our Tax Team will then call or email based on your selected preference and schedule an appointment with your Tax Professional for a comprehensive review and signing of your return.*

- Digital Drop - Upload tax documents electronically. We will send you a secure link to your dbMoney website where you will have access to your Tax Folder. After you upload your documents, our Tax Team will call or email and schedule a time with your Tax Professional for a comprehensive review and signing of your return.*
  Mailing (DB Tax & Wealth, PO BOX 160, South Milwaukee, WI 53172) or faxing (414.755.1508) your documents is also an option, but please note that if we have to physically mail documents back to you, there will be an $18 charge added to your invoice to send via Business Priority Mail.

We encourage an appointment for review and signing of your taxes! Phone, face-to-face, and web meeting are all available for a comprehensive review - there is no additional cost for this meeting. *If you choose not to have an appointment*, you will receive a date for when your return will be complete and ready for signing, and you may come in at your convenience. Rest assured, your team of professionals will contact you with planning questions or recommendations throughout this process and we may even request a follow up meeting after tax season.

Step Two: Tax Preparation

- Professional Preparation **-** After one of the above methods for delivery of your tax documents is complete, your Tax Professional will begin your tax preparation & will most likely have it ready within 10 days. You will be contacted with questions during this process, so be certain to list your preferred method of contact!

Step Three: Appointment or Pick-up

- Appointment - Sit down with your Tax Professional to go over your return, ask questions, and sign your return.** Phone or virtual appointments also available.

- Pick-up - Some people prefer to come pick up their taxes and not schedule an appointment. You will come to the office to pick up your copies, sign your return** and be on your way. If at the time of pick-up you change your mind and decide you would like to sit down with your Tax Professional, we will see if they're available for some quick questions or schedule an appointment for a later date.

***Reminder:* both spouses must sign, if married filing joint.

Tax Preparation Base Fee: $195