

# FAQ

1) Are you taking new clients?

Yes. Please refer to the New Client section towards the bottom.

2) What are your prices?

\$75 for Simple Tax Return (no dependents) + 30 minute financial consultation

\$125 for Normal Tax return (credits/deductions) + 45 minute financial consultation

\$175 minimum for Advanced Tax Return (Business) + 1 hour financial consultation

3) What documents do I send to you?

NEW Clients: Complete Tax Registration Form (on website) includes Driver License info, bank info, dependent info etc.

All Income documents - 1099 and W2s

Day Care information

School Tuition Info

Mortgage Interest 1098..

EXISTING Client: Same as above except no new Registration form; new information only

4) What are my options for payment and when do I pay?

Accepted methods of payment:

- Cash
- Credit/Debit via website
- Check
- Apple Pay
- Paypal
- CashApp

If none of these will work, fee may be deducted from your federal refund but additional bank fees apply.

Your balance **MUST** be paid in full before your tax return is submitted.

5) I normally schedule an appointment. What options do I have this year?

Due to COVID-19, we will NOT be accepting any in-person appointments for the safety of our customers and employees. All customers are entitled to a telephone or Zoom appointment included with your tax services. Please let our coordinator know your preference. Please have all questions and concerns ready for your appointment.

6) What are my options for getting my documents to you?

- DROP OFF in the black box or between my doors (if extra large)
- SCAN all documents to my email (license, W2s, etc) “.PDF ” format preferred
- FAX all documents to (410)-630-5370
- Submit all documents to your personal portal on CJBTax.com
- MAIL all documents by USPS or Fedex.

7) When will I hear from you once I submit my documents?

We will send a confirmation within 48 hours. This will let you know if we have all required documents and what is missing. We cannot start your return without all documentation.

8) How long does it take to get my refunds back?

It takes about (2-3 weeks) to receive both Federal and state refunds. Taxpayers with Child Tax Credits, Earned Income Credit or School credits will wait the longest. (3-7 weeks)

9) I have a few questions before I decide to get my taxes done. When is best time to discuss with you?

We now offer private financial/tax consultation without our tax services. Please inquire with our coordinator to schedule an appointment.

10) What else is new this year?

We are starting a weekly “Tax Talk @ 12” every Friday beginning February 6th. Our CEO will be discussing a weekly tax topic on Zoom. She will also answer any questions or concerns regarding the weekly topic. Keep viewing our social media for upcoming topics and inquire with our coordinator for more info!

In addition, we are adding the capability to easily review and e-sign your return and pay at the same time. Lastly, for clients who wish to drop off and pickup, there will be scheduled hours for curbside service.