

# Liberty Financial Consulting, Inc. – Tax Preparation Instructions

Liberty Financial Consulting, Inc.

2499 Rice Street North #21

Roseville, MN 55113

Phone: (612) 462-2163

Email: [accounting@lfconinc.com](mailto:accounting@lfconinc.com)

## Welcome to Liberty Financial Consulting

Thank you for choosing Liberty Financial Consulting, Inc. (LFC) to assist with your tax preparation needs. Our team is dedicated to providing you with the highest quality service. To ensure we can serve you efficiently, please carefully review and complete the following steps:

### Required Steps for Tax Preparation

1. Review and sign the Letter of Engagement provided by LFC.
2. New clients will pre-pay fees before work begins.
3. Complete the 2025 Tax Organizer form in full.

4. Provide a voided check. This will be used to deposit your tax refund or to draft payment for taxes owed.
5. Submit a photo ID for each taxpayer listed on the return. If filing jointly, include identification for both individuals.
6. Provide copies of your tax returns from up to the past three years.
7. Gather all documents relevant to your current tax year and deliver them to LFC. Documents can be submitted via secure data transfer (such as Dropbox or Intuit Data Transfer) or by hand-delivering paper copies to our office.

## Turnaround Time

The usual turnaround time for the completion of your tax return is between 7 and 14 days after all required documents have been received.

Brian Marum

President