Badu Tax Services, LLC

FAQs:

***What is your typical process for working with a new client?***

Our process for new customers/clients is very straight forward. You will initially complete a Badu Tax Services Client Intake Questionnaire for us to better understand your needs. Once you complete the questionnaire, we send you the next steps via email/phone. We usually communicate/kick-off this process via email (support@badutaxservices.com). We then collect a 50% deposit (for tax preparation) if you decide to move forward. We then send you a welcome email with next steps, set up a secure client portal for you, which is the primary way for us to securely exchange documents, and guide you throughout the entire process. Once all documents have been uploaded, the tax return is filed by a lead preparer within 7-10 business days typically. Once completed, you get to review your tax return, approve it, then we collect final payment, and submit. A follow-up meeting may be scheduled as we love to keep our clients in the loop regarding ways to maximize their financial security. Our clients would say that we have a very hands-on approach and we're very flexible.

***What education and/or training do you have that relates to your work?***

Jeff has a Bachelor of Science Degree in Accountancy and a Master of Accounting Science Degree in Accountancy. He is a Certified Public Accountant (CPA) licensed in the state of Illinois. He has been preparing tax returns for several years now and he used to work at a "Big Four" public accounting firm. Furthermore, he teaches personal finance through seminars/workshops across the world. Our other team members have extraordinarily strong credentials as well.

***Do you have a standard pricing system for your service? If so, please share the details here.***

Our clients always know up-front what they are paying before any services are started. Our prices are tailored toward the specific service being offer and the unique complexity of the project. A standard/basic tax return is $300. Additional fees may apply depending on the complexity of the tax return.

***How did you get started doing this type of work?***

Through Jeff's college experience and sitting for his CPA exam, he developed a love for taxation and personal finance. He loves seeing people happy and finances are a huge part of happiness. He doesn't want his clients to have to worry about money. Instead, they should have peace of mind. Taxes can have a huge impact on that peace of mind and we're here to maintain that peace.

***What types of customers have you worked with?***

We've worked with a very wide range of clients including single individuals, married couples, high net-worth individuals, doctors, business owners, etc. We have a very diverse range of clients which allows us to solve virtually any problem.

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***Describe a recent project you are fond of. How long did it take?***

We assisted a client in minimizing his tax liability by $100,000. We did this through strategic tax planning where we used several vehicles such as a deferred compensation plan. Instead of receiving a huge lump sum of money now, we broke it into pieces that would be distributed in installments later and ultimately, lead to a lower tax liability now. This added tremendous value to the client and he doesn't think twice about calling us for tax advice. The project is ongoing and is part of our tax planning service.

***What advice would you give a customer looking to hire a provider in your area of work?***

We would recommend hiring someone who cares about you. Someone who has the proper experience and can add the most value. You never want someone who's just looking to make some extra money. You deserve much more.

***What questions should customers think through before talking to professionals about their project?***

Customers should ask what value the service provider can add to them. In other words, what can the service provider bring to the table? Also, please have a general idea of your needs.