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Dear Clients, January 2022

We hope this letter finds you and your loved ones healthy and safe.

As we prepare for the 2022 tax filing season, our goal is to continue to deliver excellent tax planning & preparation service. The health of our clients, staff and families is of utmost importance to us. Therefore, Michael will continue to primarily work remotely and will not conduct in-person meetings at either office.

You will soon receive your personalized **Tax Organizer/Checklist** and a **Reminders/FAQ** document and we encourage you to use it to submit your data this year. You should include **specific questions and all new or unusual circumstances pertaining to 2021** when you submit your tax support documents. We will schedule a telephone meeting, as needed, after a preliminary review of the tax support documents and other data submitted for your 2021 tax return preparation. We expect a telephone meeting will not be necessary for the majority of our clients but want to make sure those who would benefit from it know it is available as an option.

Submission of Tax Support Documents

There are several methods available to you for submitting your tax documents:

- Electronically via our secure client portal

- Send to either office via FedEx, UPS or USPS Priority Mail. Middleton Office has moved to:

  191 South Main Street, Suite 103
  Middleton, MA 01949

- Drop-off at either office (masks required to enter both office locations).
  Charlestown: the building is open M-F from 8:30 AM – 5:00 PM. Upon arrival, please call our office (617) 242-2345 and/or drop off at the reception desk. Your tax documents will be delivered to our staff/secure office suite. A Charlestown drop-off after 5:00 PM or on a Saturday must be coordinated in advance this year.

  Middleton: The building is open M-F from 9:00 AM – 5:00 PM. Upon arrival, come to Suite 103 and knock or call (978) 646-0052 for assistance.

- **The deadline for submitting complete tax information is Friday, March 11th**. Please understand all client files submitted with missing information are placed on hold and the tax return preparation process will not begin until the file is 100% complete. Please reply promptly to avoid delays in your returns being completed if we contact you for missing information and/or documents.

Submission of Tax Support Documents (continued)

- **Extensions will be filed prior to April 15th for all client files that are incomplete on the March 11th deadline or are submitted to us after that date**. We expect more extensions than usual to be filed this year due to a variety of factors beyond our control. More information will be provided once we get further into tax season.

- According to several major media outlets, the IRS is “in crisis” heading into tax season due to a combination of factors including budget cuts, understaffing, and extra responsibilities associated with the pandemic. This will surely cause us (and you) problems. We strongly encourage you to furnish bank account information with your tax supporting documents so you can receive refunds and make payments electronically rather than via paper checks.

Completion of Returns

We continue to encourage you to take advantage of E-Signatures and E-Delivery for delivery of the completed tax returns for your review and approval since it is the most efficient method. We will continue to provide a paper copy of the completed tax returns for those of you who prefer that method or do not have access to the technology needed for E-Signatures and E-Delivery.

Please do not call the office while your tax returns are being prepared to check the status. Responding to these requests is extremely inefficient and takes valuable time away from the tax preparation process. **Our staff will contact you as soon as your tax returns are complete**. Please be patient and trust our process during this extremely busy time of year. An administrative fee will apply for repeated calls and/or emails inquiring about status.

When you receive your returns electronically, please review them carefully, preferably on a device larger than a phone.

As in previous years, invoice payment is due at the time of delivery of your completed tax returns. We submit the electronic files to the IRS and State(s) upon receipt of signed e-file authorization forms, engagement letter and full payment. We accept checks in addition to all major credit cards.

Please do not hesitate to contact Betsy & Wendy (978) 646-0052 or Karen (617) 242-2345 if you have any questions. We appreciate your business, your patience, and your continued support.

Best Regards,

-Michael, Betsy, Karen and Wendy

Important – Please Note:

The IRS will issue information letters to **Advance Child Tax Credit** recipients and recipients of the third round of **Economic Impact Payments** (aka stimulus). Hold on to those letters and submit them to us along with your other tax support documents.