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Dear Clients,

Happy New Year and good riddance to 2020! We hope this letter finds you and your loved ones healthy and safe.

For most of us, 2020 was a year in which we experienced seismic shifts in the way we navigate our daily lives. As we begin to prepare for the 2021 tax season, we have spent a lot of time planning for ways to ensure we can continue to deliver excellent tax planning & preparation service, while protecting the health of our clients, staff and families.

To that end, we are making some changes to our processes. Michael has transitioned to working remotely. Until further notice, he is not conducting face-to-face meetings in either office. However, if you have **detailed questions or any new and/or unusual circumstances pertaining to 2020**, we can schedule a telephone meeting once all of your tax documents have been received and reviewed by Michael. We expect this 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.

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

- 1) Electronically via our secure client portal
- 2) Send to either office via FedEx, UPS or USPS Priority Mail
- 3) Drop-off at either office (masks required to enter both buildings). Please be assured that both office suites are secure, only our staff have access.
  - **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 8:30 AM – 6:00 PM. Upon arrival, come to Suite 210 and either slide your documents under the locked door, drop your documents into the secure drop-off box located outside our office suite door or knock/call for assistance (978) 646-0052.

Schrafft's Center Powerhouse  
529 Main Street, Suite P200  
Charlestown, MA 02129  
T. 617.242.2345 F. 978-646-0053

161 South Main Street  
Suite 210  
Middleton, MA 01949  
T. 978.646.0052 F. 978.646.0053

This year more than ever, we encourage you to gather and submit your tax documents as early as possible to allow us the proper time needed to prepare and file your returns or calculate the payments required with your extension. A personalized **Tax Checklist** and a **Reminders/FAQ** document will be sent to you via email or postal mail by the end of January. Please use the Tax Checklist to ensure you submit all of the information we need and refer to the Reminders/FAQ document for helpful hints.

**This year's deadline for submitting complete tax information to us is Monday, March 15<sup>th</sup>. If complete tax information is submitted on or after this date, it is likely Michael will file an extension for you instead of your tax returns. Your tax returns will then be completed and filed after April 15<sup>th</sup>.**

As has been our practice in the past, tax returns will be prepared on a "first-come, first-served basis". Michael does not begin work on a file until all of the information needed has been received. Therefore, it is in your best interest to respond as quickly as possible if we contact you about missing information or other questions.

We will contact you immediately when your tax returns are complete to coordinate delivery. Please do not call the office to check the status of your returns as responding to these requests takes time away from completing the tax returns.

We implemented **E-Signatures and E-Delivery** last year to improve the efficiency of the delivery process and it was a huge success. We strongly encourage any of our clients who did not take advantage of E-signatures and E-Delivery last year to consider making the change this year.

As in previous years, payment of your invoice 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 and full payment. We accept checks and all major credit cards.

It has not been an easy year, but as always, we appreciate your business and look forward to continuing to work with you. Please do not hesitate to contact Betsy (978) 646-0052 or Karen (617) 242-2345 if you have any questions. We appreciate your continued support as we navigate this new public health landscape.

Best Regards,

**-Michael, Betsy & Karen**

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