



Anita C. Simperts, EA

Tax and Payroll Service

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Dear Client,

I hope this letter finds you well. As we approach the tax season, we appreciate your continued trust in our services. To ensure a smooth and secure process, we would like to bring some important updates to your attention.

New Items of Interest: In our ongoing effort to enhance our tax preparation services, we have introduced some new sections to the tax organizer. Please take a moment to review the updated organizer, as it now includes specific prompts for additional information that may be relevant to your tax situation.

Secure Document Submission: To safeguard your sensitive information, we kindly request that you do not send your tax documents via regular email. Email communication is not a secure method for transmitting confidential financial information. Instead, we offer two secure alternatives for document submission:

1. **Verify Portal:** You can securely upload your documents to our Verify portal. If you haven't already registered, please visit <https://verify.com/login/> to create your account. Once registered, you can upload documents directly to our secure workspace.
2. **Secure File Pro Portal:** Alternatively, you may use our Secure File Pro portal for secure document submission. Access the portal <https://simperstax.securefilepro.com/portal/#/login> and follow the instructions to upload your tax documents securely.

Mailing or Dropping Off Documents: You can also mail or drop off your physical documents to our office.

Important Instructions for Document Preparation: To streamline the processing of your tax documents, kindly adhere to the following instructions:

- Open all envelopes, unfold documents, and keep them flat.
- **Do not staple** documents.
- Put the documents in the order as listed on the organizer.
- Submit all documents when you have everything, with the exception of K-1s.
- We cannot accept .jpg or similar picture files. **Please convert to PDF before sending.**
- Please upload your documents in **ONE** PDF file, not an individual file for each document.
- Please include a list of all documents you are submitting.

Important Dates: To ensure timely and accurate processing of your tax return, please submit all relevant documents by March 15th. After this date, returns will probably be placed on extension.

We appreciate your cooperation in adhering to these security measures. Should you have any questions or need assistance with the document submission process, please do not hesitate to contact our office.

We look forward to serving you and making this tax season a smooth and stress-free experience.

Sincerely,

Anita C. Simperts EA

NEW OFFICE HOURS

Monday & Tuesday	9 am – 6 pm
Friday & Saturday	9 am – 4 pm

CLOSED – Wednesday, Thursday & Sunday**

**To actually complete taxes, we require uninterrupted work time, hence the three closed days.