



Anita C. Simperts, EA

Tax and Payroll Service

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Hello Everyone!

The IRS will begin accepting personal returns January 27th

What a challenging year 2020 was! At the beginning of tax season, we were seeing people as usual. Then, in mid-March, Covid-19 changed the way we conducted business. Cleaning the office after every client was cumbersome, so, we stole our Veterinarian's idea and met clients outside. Tax documents were dropped off, uploaded to the portal or mailed. And it all seemed to work well, so we shall continue to keep the office closed to the public and operate virtually. The last thing we want is to be the source of a Covid infection!

For those who missed all the fun last year, don't worry, it's easy! Instead of coming in the office, you have three options of getting your tax documents to us.

1. Dropbox – we have two. One is located in front of the office window (raise the flag) and the other is by the sidewalk and driveway when you bear left up the driveway (ring the doorbell inside the box). We check the boxes frequently, especially when you ring the bell or raise the flag indicating that documents have been left.
2. Upload to the portal – if you have not used the portal before, email us and we will send a link or you can access it through our website.
3. Mail – I recommend "Priority" with tracking. It is more expensive, but I feel it is worth the extra money. It is the only way I send tax documents.

As always, we will email, call or text you with questions, so please make sure your contact information is up-to-date.

When your taxes are finished, you will be contacted and offered three options for receiving your tax returns: from the portal, Priority mail or curbside pickup (drive up and we will bring your returns out to you).

NEW or important –

Economic Impact (EIP)/Stimulus payment – please provide IRS Notice 1444. If you misplaced the notice, you can go to IRS.gov, View Your Account and click on Check Your Economic Impact Payment Status (yellow box). This payment is not taxable, but we need to reconcile the amount you received on your tax return. It will take over 21 days for the IRS to send me the amount AFTER I fax a signed Power of Attorney for each taxpayer and there will be a fee for this service.

Charitable Donations (cash, check, credit card)– you can deduct up to \$300 without itemizing.

Changes – please provide any NEW changes (marital status, address, phone number, dependents, started a business, new rental property or any other changes).

Virtual Currency transactions – considered legal tender, so if you were involved in any transaction, contact us.

Interest in Foreign accounts totaling \$10,000 – at any time during the year, please discuss this with us.

Please return the organizer, signed Engagement Letter, your tax documents and your last YTD payroll stub from each employer you had in 2020 (please be sure it is dated 2020). Thank you for taking the time to organize your tax documents. Please contact us with any questions or concerns.

Warmest Regards,

Anita

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HOURS during tax season:

Mon, Tues, Thurs.....9 am – 6 pm

Fri, Sat.....9 am – 4 pm

CLOSED: Wednesday & Sunday

*****Please do not STAPLE your paperwork, a paperclip is the perfect option.*****