

January 2022

Dear Client,

This is a follow up to the letter we sent a couple of weeks ago (via email) explaining the changes we are making in our office. You all should have received the email outlining the New Tax Preparation Process. In an attempt to better serve everyone, we have decided to change our process of tax preparation and **we are no longer preparing the return as you “sit in our office”**; I’m sorry, but those days are over. Tax preparation continues to get more complicated and requires more review and attention *after* the appointment, and we simply need more time to get things done for everyone.

To help speed things up for us all, we are sending the yearly Tax Prep Agreement and Tax Questionnaire in advance. Both must be completed and returned to us to prepare your 2021 tax return.

- ✓ The light green paper is the yearly Tax Prep Agreement. The same one we use every year which you would sign and date while in the initial tax interview. As we are no longer using that old process, this document is enclosed now and needs to be signed, dated, and returned to begin tax preparation.
- ✓ The yellow paper is the Tax Questionnaire you would also complete at the appointment, but now needs to be done in advance. Respond to the statements/questions and return all pages with your 2021 tax information. Due to tax law changes in the last three years, the questionnaire is more detailed than before. Please review closely and provide the requested information.
- ✓ **To upload all tax forms, worksheets, organizers, and the enclosed documents to your secure client portal, go to [www.MYTAXLADYROCKS.com](http://www.MYTAXLADYROCKS.com) : The home page has the Fileshare link. The username is your email, and if you have forgotten your password, follow the instructions to create a new one. *Do not send tax documents or confidential information in an email. Use your secure client portal for secure and private delivery.***
- ✓ **AFTER** we have received all your tax info (via Fileshare or you just want to drop it off), we will prepare a preliminary return, and then contact you for a “Review Appointment”
  - You can either come into the office to review, discuss, Q & A, and sign the efile forms,
  - Or, if you prefer a phone appointment, we will send a review copy via RIGHTSIGNATURE so you can see and discuss the results and we can answer questions you may have. This is how many of you already do it, so it is not a huge change.
  - If you want to meet with Neala or Kylie *before* we start the tax preparation instead of a “Review Appointment” after, you will need to call to schedule a 30-minute “Document Review” appointment in the office. (801) 768-1500. *(This is not a tax preparation appointment; the return will not be completed in this meeting).*
- ✓ **OFFICE HOURS** Jan 24<sup>th</sup> – April 18<sup>th</sup>:  
Monday – Thursday (closed Fridays) 8:30 AM – 6 PM Mountain Time  
Saturday 9:30 AM – 1 PM MT

- No appointment is necessary to just drop things off during office hours.
    - But, if you are bringing originals, please be prepared to wait a few minutes while we scan/copy for our records and return originals to you immediately.
    - Or, if you have already made copies for us, you won't need to wait for us to scan.
    - However, if you *leave* originals with us, you will also have to pick them up later. *(So, seriously, save the time and gas money and upload your info).*
  - If you prefer to mail things; Please send copies (not originals) of tax forms, along with the green and yellow papers to the office address: 11073 No. Alpine Hwy, Ste 201, Highland UT 84003.
  - DO NOT LEAVE ANY PERSONAL AND CONFIDENTIAL DOCUMENTS AT THE DOORS. THERE IS NO DROP BOX! We are not responsible for your information left unattended outside of the office.
- ✓ We have tried our best to keep costs down the past couple of years. However, our industry like everyone else's is feeling the unfortunate effects of inflation and staffing challenges. Please be prepared for a slight increase in fees. We estimate approx. \$15-\$25 increase from last year's 1040 tax prep, for a basic 1040 filing. If you have additional activities like self-employment, investments, farm, rentals, K1s, Cryptocurrency, and/or tax law changes; that will also affect the final tax prep fee.
  - ✓ EXTENSION FILING: Please remember you must request an extension. *(It is not "automatic" just because we haven't heard from you).* If you owed in 2020, we will assume you owe again for '21 and you will receive payment vouchers via Fileshare to pay the estimated 2021 taxes *(based on your 2020 results)*
    - If you did not owe for 2020, but think you might owe for 2021, we can't just make something up, so you need to provide as much information as possible by April 1<sup>st</sup>.
    - If you believe you are getting a refund for 2021, there is no tax payment required when we efile your extension.
    - If taxes are due and paid after April 18<sup>th</sup>, 2022 for the 2021 year, there will be late payment penalties and interest added to the final balance due to the IRS and/or State(s).

Once we receive your information, we will put your return into our schedule, we are usually about five – seven days out after receiving EVERYTHING. If you want your individual return completed by the deadline, or an extension estimate calculated, we must have ALL your information no later than April 1<sup>st</sup>. We will not guarantee a completed return for the deadline if your information is received after April 1<sup>st</sup>, and an extension may need to be filed.

As we work on the return and discover items missing or have concerns/questions, we will communicate with you via email and/or phone. **We do not text clients to have a tax conversation, nor will we receive documents via text.** Once we have completed the return, you will receive a review copy via RIGHTSIGNATURE with the Form 8879 that must be signed and dated and returned to us for E-filing, and a final tax prep invoice. Tax prep fee must be paid prior to E-filing the completed return.

You will continue to receive the best service we can offer, and we look forward to assisting you now and in the future. If you have any questions, please feel free to call or send a quick email. Thanks always for your continued business and friendship – and this year, we especially appreciate your patience as we implement these changes.

Sincerely,