Paice Tax and Accounting, Inc.

120 South State Street, Suite D · Clearfield, UT 84015
Phone (801) 774-0498 · Fax (801) 774-6249 · www.paicetax.com

January 7, 2021

Dear Friend,

The staff of Paice Tax and Accounting would like to extend to you our wish for a happy and prosperous new year. We hope that you had an enjoyable Christmas. Along with the new year comes the preparation of your 2020 income tax returns. We would like to review a few items concerning the upcoming tax filing season.

Filing Timeline: As you all know, due to the COVID-19 outbreak last year the 2019 filing deadline was extended until July 15, 2020. At this time there is no indication from the IRS that they plan on extending any tax filing deadlines for 2020 tax returns. We intend to operate assuming the normal deadlines of March 15th for S Corps and Partnerships, and April 15th for Individual Form 1040s, C Corps and Trusts/Estate returns. If something changes, we will keep you informed. We do not yet have an e-file start date from the IRS but anticipate it to be during the final week of January as it has been in the past.

Appointments / Scheduling and COVID-19 Precautions: Last year we had to close our office to in-person appointments midway through the filing season due to the COVID-19 outbreak. We re-opened our office early last summer, and our current plan is for our office to be open for business as usual during the upcoming tax season.

All clients will be required to wear masks when entering the building and we ask you to maintain 6-foot social distancing when possible. We will be staggering appointment times to limit the number of people in our office at any given time. We will be wiping down desks with disinfectant between clients. We have hand sanitizer available and we have installed plexiglass shields on each preparer's desk. The preparer may remove their mask while seated at their desk behind the plexiglass shield. We have purchased pens for you to keep. All employees will have their temperature taken each morning when reporting to work and will be sent home if displaying a fever or any other COVID-19 symptoms. ***We also ask all clients to avoid coming into our office if you are displaying any symptoms.***

In order to limit the amount of people in our office we need to restrict those coming to the appointment to those who must be there to either sign, or provide information or assistance. ***Please do not bring children or others who do not need to be there to your appointment.***

As in years past, we have tried to pre-schedule your appointment close to the date and time that you came in prior years. **A yellow card is enclosed that lists your appointment date / time/ and preparer**. ***If you cannot come at the pre-scheduled date and time, please call our office as soon as possible to reschedule a time that is convenient for you. Our phone number is (801) 774-0498***.

We realize that due to the Coronavirus some people are not comfortable being out in public. We do have a couple of options if you are not comfortable coming into our office. The first, and preferred option, is that you keep your pre-scheduled appointment time and drive to our office. When you get here, at your scheduled time call our office at (801) 774-0498. One of our staff will come out to your car to gather your tax documents. Your preparer will complete your tax returns while you wait in your car. If the preparer has questions, they can either call you on a cell phone, or come out to your car. When finished, the preparer will bring out the signature documents out for you to sign, and collect payment. All employees coming in contact with you at your car will be wearing a mask at all times. While we know this is not ideal, most returns are completed within an hour. This is more convenient as you will be here to answer any questions, sign the returns, and pay the preparation fee without having to come back for a follow-up visit. This will allow us to e-file the returns that day without delay.

The other option is that you can drop-off your tax documents. You can either drop-off your information in the locked drop-box attached to the front of our building, bring the documents inside and leave them with our receptionist, upload electronic copies of your documents to our online client portal, or mail your information to us via U.S. Mail. We will work drop-off returns as quickly as possible on a first-come, first-served basis. This is a little less convenient and takes more time as we have to try to call you to review

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the returns. We then have to arrange a way to get the returns signed, and to get your payment. We cannot e-file any returns until the documents are signed and paid for. ***If you would prefer to drop off your information please call us as quickly as possible to cancel your pre-scheduled appointment to free up our schedules.***

Website: We invite you to check out the features of our website. From our website you can access our client portal to send or receive documents, download electronic copies of your tax returns, make payments, or access many fact sheets and newsletters on a variety of different tax topics by clicking on the tab labeled "*Tax Resources.*"

Data Security and Client Portal: ***In an effort to safeguard personal client data we have implemented a "no click" policy. We can no longer send or receive documents via email attachment.*** Phishing emails are emails that look legitimate containing attachments. Clicking on one of these attachments could allow a virus or ransomware to be introduced into our computer network. Since it is impossible to tell which emails are phishing scams and which are legitimate, we can no longer open any email attachments.

All electronic documents sent to or received from our office must to be sent through our secure client portal. To access the client portal, go to our website and click on the tab labeled "Client Portal." You will need to enter your social security number, (for those who file married filing joint, you will enter the social security number of the person listed first on the tax return.) The first time you use the portal you will need to set up a password. Click on the link that says "Need a Password or Forgot Password." If we have your cell phone number or email address in our system, (again for those who file married filing joint, this will be the cell number or email of the person listed first on the tax return), the system will send you a temporary password to log in. Once logged in you will be prompted to change your password. If you encounter problems, or if we don't have a cell number or email address in our system for you, call our office and we can manually reset the password.

Preparing for Your Appointment: Please carefully review the enclosed *2020 Tax Return Checklist* and use it to prepare for your appointment. **It is extremely important that you come prepared, with all required documents needed to prepare your tax returns**. Our preparers' schedules are very busy during tax season. If we are unable to complete your tax return because you are missing required documents, we will be forced to reschedule an additional appointment to finish the returns. Sometimes it may be several days, or weeks before we will be able to get you back in to finish your returns. If it is time for your appointment, and after reviewing the checklist, you are missing some of the documents, please call our office and reschedule your appointment when you can come with all required documentation. If you need additional help preparing, in addition to this checklist there are several more detailed organizers available in our website.

Children required to file: It is our experience that tax returns filled out for dependent children often include errors. While these appear to be very simple returns on the surface, if they are prepared incorrectly they could potentially cost you thousands in deductions and credits on your return. These errors could also delay the processing of your return and require your child to file amended returns to correct their filing errors. Our advice: ***Do not allow your dependent children to prepare or file their own tax return, especially college students, and do not prepare them yourself.*** For any dependent child claimed on your tax return, we charge a minimal fee of $30 to prepare their federal and one state returns. This is very small compared to what an incorrect filed return could potentially cost you in tax or preparation fees to correct errors after the fact.

Payment Policy: We require payment for services at the time your tax return is prepared. We accept cash, checks, Visa, MasterCard, Discover, or American Express as payment. Bounced checks may be referred to an outside agency for collection and may be subject to additional collection fees. We will not electronically file or release the tax returns to you for mailing until the preparation fees are paid. If you do not have the money available to pay the fee at the time the returns are prepared, we do have options to withhold our fee from your federal tax refund. There is an additional charge for this service. ***We do not accept post-dated checks.***

Personnel: One of our long-time employees, Sam Fulton, is cutting back this year and will only be taking a few Saturday appointments during tax season. If Sam prepared your returns in the past you may see that you have been reassigned to one of our other qualified preparers. Please be assured that all of our preparers are experienced and qualified to assist you.

Referrals: As always, our best advertisement is our satisfied clients. If you are pleased with our services, we hope that you will recommend us to a friend, relative, or co-worker. To show our appreciation we will send you a $25.00 gift card for each new client you refer (excludes clients' dependent children). A referral coupon should be submitted for each one. There is a sheet of referral coupons included with this mailer.

Thank you again for choosing Paice Tax and Accounting for your tax preparation needs.

Sincerely,

David W. Paice, EA
CEO, President