



January 14, 2021

Dear Client,

I hope 2021 finds you both healthy and happy after a trying year for most. The Covid-19 pandemic has caused a lot of changes in everyday ways of doing business for almost everyone. Our business, like many, have made some positive changes to help accommodate you in as many ways as possible.

Toward that effort, we've redesigned our website to allow you to securely send documents remotely, E-Sign those documents, and receive full tax returns and other documents, all through the same portal. This will allow you to have your taxes done virtually if you so choose, at no extra cost. Let us know if you would like to utilize this portal and we can set up a secure account for you, where you can always access your documents.

For those that prefer to bring in your paperwork, we still have a drop box outside our front door, or a box right inside our front door, for minimal contact. However, if you still want a face-to-face meeting, we have put up sneeze guards for your protection.

You'll notice some changes on the organizer this year. Please look on the back and fill out the Notice 1444 and Notice 1444-B information, or simply include these documents with your other 2020 tax information. These notices report the amount of stimulus payments you received. They must be included on your return. They will not be taxed. However, if you didn't receive either stimulus, you will be able to claim those payments on your 2020 tax return. This will apply to those who had newborn children in 2020, those you may want their 2019 dependent children over the age of 16 to file their own tax return so they can claim the stimulus payments, and other situations. Email or call our office if you

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need more details. There may be many instances where you can claim stimulus payments on the 2020 tax return.

For those of you who collected unemployment in 2020, please be looking for a 1099-G form from the state. Unfortunately, unemployment is taxable, so you need to send this document with your other tax information.

We also have a new addition to our team this year. Her name is Ashlyn Lewis and she will be helping with tax returns and bookkeeping services, full time, year-round. She's still an accounting student, planning to become a CPA in the next 2 years. She also happens to be my daughter, so naturally, she's awesome! You'll love her when you meet her...many of you have heard all about her for years.

We look forward to catching up with you again this year, and please tell your friends and family we would be happy to help with their tax or bookkeeping needs.

Sincerely,

*Linda Dillon*



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