

BETH KISSINGER, CPA

2020 TAX PREP - IMPORTANT INFORMATION

➤ PROVIDING YOUR TAX INFORMATION IS EASY

- I accept tax information by: Secure Website Portal, US Mail, UPS, FedEx, and drop off to my lock box only – Sorry, no in person visits allowed this tax season
- Drop off is available via two (2) clearly marked, locked, drop boxes on the exterior of the building, right near my front entrance door (left & right side)
- Get your information to me as early as possible
 - ALL forms and questionnaires from me must be completely filled out and returned with your information – **NO work will begin until these forms are received.**
 - All information located on my website Bethkcpa.com
 - Do not delay if only missing a 1099, brokerage statement, or an item or two
 - Provide your other information and include a note stating you are missing info
 - Your returns will **NOT** be finalized until any issues are resolved to our mutual satisfaction
- **ITEMS TO PROVIDE:**
 - Forms: W-2, 1099, 1098, 5498, K-1, property tax receipts, estimated tax payment proof, charitable donation proof, HSA funding & withdrawal proof
 - **Do NOT submit your medical receipts**, merely provide the total spent, by category, in the organizer
 - Copy of driver's license for taxpayer and spouse if changed in any way since last year or if not previously provided to me
 - Voided check from account if direct deposit or ACH payment is chosen

➤ ADDITIONAL TAX DUE WITH YOUR RETURNS?

- All returns electronically filed before April 15 have until April 15 **to pay any tax due**
- Tax due can be paid with a check or via ACH deduction from your account
 - ACH payments can be scheduled for any time up to April 15, 2021 (subject to change)

➤ APPOINTMENTS, DROP OFF AND MEETINGS

- No scheduled in person appointments are available for 2021 – Zoom & phone options available
 - **No walk-ins will be accommodated or allowed entry**
 - Please mail or drop off your information and include a note detailing anything you may want my extra attention focused on.
 - We will communicate about any issues that arise as I am working on your data
- Mailed and dropped off returns are immediately put into the processing queue.

➤ DEADLINE FOR INFORMATION

- All information should be in my office no later than March 15, 2021
- Returns are completed on a first come, first served basis
- My fees increase weekly after March 15, 2021
- Extensions may be necessary, and work may be turned away for those who: have late arriving data and/or incomplete questionnaires, are uncooperative and/or unresponsive to requests.

➤ EXTENSIONS are available at an extra fee and may be required for late arriving information

➤ COOPERATION - Your prompt response to my inquiries and requests for further information is expected