

January 2022

Dear Tax Client:

Happy New Year!! Let's hope 2022 is better in many respects than the previous couple of years.

I am happy to report that I am healthy, but I am sad to inform you that my sweet black lab, Maya passed away in August at over 15 years old. She is very missed.

I will be working with only the aid of my canine companions Daisy & Stella this tax season, so I appreciate your cooperation in complying with the "new normal" rules I have had to implement. Staying healthy physically and mentally is the goal and to achieve that, my accessibility will be limited this year.

➤ SAFETY:

- In an effort to stay healthy and as unexposed to contagious viruses as possible, there will be no entry allowed into my office. This applies whether you are vaccinated or not and masked or not. This is the protocol until further notice.
- I will contact you via the method you have chosen on the tax preparation worksheet (telephone or email) with any questions, requests, comments or suggestions I may have.

➤ DELIVERY OF INFORMATION TO BETH:

- Use of electronic client portal via SecureFilePro is available 24/7 – This is the safest electronic method!
 - Advance set up is required – if used previously, you can still access your account
 - If you would like to be a new user, please email your request to me at Beth@Bethkcpa.com
 - Electronic (personal) organizers are available for you to download and use from this client portal, but only if you have access
 - **DO NOT** text or send your confidential information through regular email – it is not secure
 - All my questionnaires, checkoff lists, forms, etc. **MUST be completed and returned** with your documents
- 2 Locking Drop boxes at the office are available 24/7
 - No need to call ahead to ask if you can use the drop box
 - Boxes are emptied regularly throughout the day
- US Mail or any other delivery service can be used to send your information to me
- It is likely that final, correct information from brokers may not be received until mid to late March. **DO NOT wait** until you get that last brokerage or K-1 form to initially bring your information to me. Provide the bulk of your information early, I will input what you have and then we will finalize your return when the final form arrives. Waiting to drop off all your information at once in mid to late March **is not advisable** and will likely result in the need to file an extension.

➤ DELIVERY OF COMPLETED TAX RETURNS:

- Completed returns will be mailed via USPS
- Electronic copies can be posted to your client portal (for anytime retrieval)

➤ ITEMS TO KEEP IN MIND:

- The IRS still has not processed some 2020 returns, so I don't have very high expectations for fast refunds, or easy filing this year.
- Returns for 2021 cannot be timely processed by the IRS unless accurate information regarding economic impact payments (Letter 6475) and/or advanced child tax payments (Letter 6419) are reconciled on the return prepared.

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➤ **ITEMS TO KEEP IN MIND:** (Continued)

- If you do not have the letters from the IRS reporting the amount they consider paid to you during 2021, you can obtain the information from the IRS by creating an online account (IRS.GOV) or you can request an IRS Transcript be sent to you by calling the IRS automated phone transcript service at 800-908-9946. Transcripts take 5 to 10 calendar days to get through the US Mail.
- **Tax filing due date is Monday April 18, 2022**
- While the standard deduction for federal returns increased so that many do not itemize deductions for their federal returns, there is a lower state threshold, so providing all your itemized deduction information is the safest way for me to determine if those expenses can lower your state income tax
- \$300 Charitable donations per taxpayer (\$600 if married filing joint) can be deducted without itemizing, but only if proper proof of donation is provided
- In an effort to keep steady with inflation, new filing and reconciliation requirements, my fees will be increasing. Additional charges will be incurred for service requests including but not limited to: 2022 tax planning, estimated tax calculations, IRA/HSA/ retirement funding savings calculations, responding to emails, appointments, missed appointments, accounting services, postage, requests for last minute tax services and extension preparation.
- I handle all returns on a first come first served basis. If you are unable to provide your information by March 11, 2022 an extension may be necessary and a premium fee for my services should be expected.

Remember, failure to timely provide all the information requested, and/or failure to complete the **ENTIRE** questionnaire and **ALL** worksheets provided, will delay the processing of your returns, result in a higher preparation fee and may result in missed deductions, higher income taxes, penalties and interest. Please help me to do an efficient job for you as painlessly as possible.

I am looking forward to assisting you in 2022. I would be happy to discuss any item of concern or interest you may have pertaining to the current or proposed tax laws, or any of the information in the enclosed package. Best wishes for a happy, healthy and prosperous 2022!!

Sincerely,

Beth

Beth Kissinger
Certified Public Accountant