

# BETH KISSINGER, CPA

## 2021 TAX PREP - IMPORTANT INFORMATION

### ➤ PROVIDING YOUR TAX INFORMATION IS EASY

- I accept tax information by: Secure Portal, US Mail, UPS, FedEx, and drop off to my lock box only – Sorry, no in person visits expected to be allowed for the duration of 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 18 have until April 18 **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 18, 2022

### ➤ APPOINTMENTS, DROP OFF AND MEETINGS

- No scheduled in person appointments are available for 2022 – Zoom & phone options available
  - **No walk-ins will be accommodated or allowed entry – regardless of vaccination status or whether you are wearing a mask**
  - 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 11, 2022
- Returns are completed on a first come, first served basis
- My fees increase weekly after March 11, 2022
- 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