

Joan W. Halter, CPA

IMPORTANT INFORMATION REGARDING 2020 FILING

Happy 2021!

We hope this message finds you and your family healthy in the New Year. We believe it is safe to say that 2020 has made us all take a step back and look at the world differently.

To that end, we at Joan W Halter CPA are making some changes to help keep our community safer. For those of you that filed your tax return last year after the State-mandated shutdown in March, much of what we describe below will be familiar. For those of you that filed before the shutdown, we made changes to effectively be a “touchless” operation. The “touchless” process worked well and allowed us to keep the office healthy and available to serve your tax and accounting needs. We have further modified the process in anticipation of the 2020 Tax Filing Season.

We are employing technology and processes to be a “touchless” service provider to you. The following Q&A describes our Tax Filing Process in detail. Your cooperation is greatly appreciated and necessary as we continue to navigate this pandemic and work to keep everyone healthy.

How is JWH CPA managing the pandemic?

As noted above, we moved to a “touchless” process to minimize the number of individuals entering the office. Additionally, we have achieved a “paperless” office scenario, this allows us to operate remotely if conditions dictate.

Will there be office appointments?

For the Tax Filing Year 2020, we will NOT be offering in-person office appointments, however, if you have experienced a “life changing” event (e.g., birth, marriage, death, purchased/sold a property, started/closed a business, etc.) we can schedule a phone conference with Joan to discuss the details and the impact on your tax situation.

How will I communicate my tax situation?

Enclosed you will find a slightly more comprehensive organizer than in past years. This organizer is intended to assist you with compiling the necessary documents and to provide us with the details to prepare the most advantageous tax return. **As such it is extremely important that you accurately complete the organizer in its entirety.**

How do I deliver my tax documents to JWH CPA?

There are several methods for delivering your tax documents:

1. We have included a self-addressed envelope that you may utilize with the United States Postal Service (USPS),
2. You can utilize other delivery services such as FedEx or UPS,
3. You can use the secure Onvio Portal to upload your documents to us (if you have not registered for Onvio, please call the office to do so now),
4. We have installed a locked parcel drop-off box near the parking lot (adjacent to the sidewalk in front of the handicapped parking space). The box is emptied periodically during business hours, or
5. We will accept documents during business hours at a drop-off window adjacent to the office entry door. To maintain social distancing, please limit the number of individuals at the window to one Client at a time.

What is JWH CPA's internal deadline for submitting my tax documents?

This is a major change from past years, there will be **no** internal JWH CPA deadline for submitting your tax documents. We will be completing returns in the order in which they are received. Please note that "received" means that we have received ALL your documents necessary to prepare your return. **To that end, please do not submit your information until you have received ALL the tax documents you are expecting and have completed our packet in its entirety.** The enclosed organizer including the checklist can be a useful tool in determining when you have received all your expected tax documents. We will inform you if it is necessary to file for an extension of the 4/15/21 deadline.

How will JWH CPA communicate with me during my tax preparation?

Unless you do **not** have an email address, we will be communicating with you during the tax preparation process via email. Please ensure we have your "best" email address when completing the packet and be sure to monitor that address while we are preparing your return.

How will I receive my prepared tax return from JWH CPA?

As started in March 2020, we will be utilizing the USPS Priority Service with "Tracking" to deliver your returns once we have prepared, reviewed, and processed them. We will notify you via email of the mailing date and tracking number of your package.

Upon your receipt, please review your return and contact us with any questions you may have. Upon your satisfactory review, please return your signed Form(s) 8879 along with payment for the tax preparation services to our office by mail, delivery service, or physical drop off (please see above for ways to drop off). Upon receipt of the Form(s) 8879 and payment, we will e-File your return. You will be notified by email of the acceptance of your electronically filed return.

Should you have additional questions, Sharon Allen is available to help. Please feel free to contact her. Her direct number is 856-478-0770 ext.101.

Again, we want to express our advance appreciation for your understanding and your cooperation in helping us keep our community healthy.