

Joan W. Halter, CPA

IMPORTANT INFORMATION REGARDING 2021 FILING

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 will I communicate my tax situation?

We have adopted a technology platform, Canopy, that includes a secure client portal for the electronic sharing of documents for those that wish to take advantage. While we recommend clients take advantage of the Canopy portal, it is not mandatory, and documents can still be shared via delivery services or dropped in our secure drop box located adjacent to our parking lot.

One significant improvement supported by Canopy is an interactive tax organizer. For clients that have or will take advantage of the Canopy portal, we believe you will find the Canopy Organizer to be a simple tool to guide you through providing critical information detailing your specific tax situation. For clients that are more comfortable with physical documents, we will provide a paper organizer that when completed will provide that critical information needed to understand your tax situation.

Both organizers are 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 either organizer in its entirety.**

Where is the office, how do I send mail and/or deliver tax documents?

We have moved! Physically we are located at 69 South Main Street, Mullica Hill (look for our blue and white sign). Our main office is a second-floor suite with first floor availability by appointment only. We are located directly above the offices of J. Downs Law. Deliver items to our office as follows:

ELECTRONICALLY

Please use the secure Canopy Portal to upload your documents (if you need to establish a Canopy portal, please contact our office at 856-478-0770, ext 101 or at admin@haltercpa.com)

UNITED STATES POSTAL SERVICE

Joan W. Halter, CPA
P.O. Box 99
Mullica Hill, NJ 08062

UPS / FEDEX / DROPOFF

Joan W. Halter, CPA
69 S. Main St., Suite B
Mullica Hill, NJ 08062

We continue to maintain our secure drop box located adjacent to our parking area, for in-person drop off.

Will there be office appointments?

For the Tax Year 2021, 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.

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

Resource management challenges during the pandemic necessitate detailed planning. To that end we are requesting that clients submit their “complete” documents no later than March 21, 2022. We will be completing returns in the order in which they are received. Please note that “received” means that we have received ALL documents necessary to prepare your return*. We will inform you if it is necessary to file for an extension of the 4/18/22 deadline.

****If you typically have 1 or 2 documents that always arrive late (e.g., brokerage statements or K1s), please submit all other documents when complete with a note detailing what is missing.***

Are there tips for managing my fee and expediting processing?

You impact your preparation fee. Incomplete tax document submissions, extraneous documents, and disorganized submissions drive the expense of return preparation beyond our base fees. We offer the following tips to assist in managing your fee:

1. Use the tax organizer, this provides you an opportunity to capture tax information not associated with an IRS Form (e.g., child/dependent care, residential energy credits, electric vehicle credits, property damage, charity, medical, real estate taxes, etc.) and the checklist provided with the Engagement Letter, this provides you an inventory of documents used to prepare your prior year. “Missing Information” results in extra emails, phone calls, follow up, and overall extra time to prepare your return. ***Avoid “Missing Information” by ensuring a complete tax document package (see Item 3).***
2. The documents we need to prepare your return include any and all documents with an IRS form designation number (e.g., W-2, 1099, 1098, 5498, SSA-1099, etc.) and/or IRS notice number.

A document may say “Important Tax Document” but unless it has a form or notice designation, it is not necessary for the preparation of your return, and it clutters your file which adds to the fee. (e.g., year-end statements)

3. An organized tax document submission includes: your completed organizer and only those documents with form and/or numbers described above. Please open and discard envelopes and remove staples. Having us “open the mail”, sort non-tax documents, remove staples, etc. all drive the time (and therefore the fee) to prepare your return.
4. Monitor your email during preparation and respond timely to requests.

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

We will be communicating with you during the tax preparation process via Canopy and/or email. Please ensure we have your “best” email address when completing the packet and be sure to monitor that address often while we are preparing your return.

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

FOR CLIENTS UTILIZING THE CANOPY PORTAL, we will upload your returns for your review, acceptance, and signature. Also uploaded will be the e-file authorization forms. You will receive an email invoice for our professional services. Upon our receipt of the signed documents and payment, we will e-file your return(s). You will be notified by email of the acceptance of your electronically filed return(s).

*****NOTE: The IRS requires us to e-file returns within 10 days of processing. This helps to aid in the prevention of identity theft. After 10 days, additional steps must be taken to re-validate your return for e-filing. This will result in an additional \$25 fee.**

FOR CLIENTS THAT HAVE SELECTED TO RECEIVE PAPER DOCUMENTS, we will be utilizing the USPS Priority Service with “Tracking” to deliver the returns for your review, acceptance, and signature. We will notify you via email of the mailing date and tracking number of your package. Upon our receipt of the signed documents and payment, we will e-file your return(s). You will be notified by email of the acceptance of your electronically filed return.

*****NOTE: The IRS requires us to e-file returns within 10 days of processing. This helps to aid in the prevention of identity theft. After 10 days, additional steps must be taken to re-validate your return for e-filing. This will result in an additional \$25 fee.**

How do I receive and pay my invoice?

We prefer electronic payments* but also accept cash, check and money orders. *We no longer accept credit cards.*

*To pay electronically, click “view invoice” and then click “make a payment”. You will be prompted to enter your bank information (routing number, account number, etc.).

Additional Questions?

Should you have additional questions, Michele D’Agostino is available to help. Please feel free to contact her. Her direct number is 856-478-0770 ext.101. She is in the office M-F 9am – 4pm.

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