

2021 TAX PREPARATION PROCEDURE

Another tax season is upon us! We continue to make improvements to our procedures in an effort to make preparation and completion of tax returns as streamlined and easy as possible. We ask for your cooperation to help make this process run smooth.

NEW THIS YEAR!!

We have updated our website to include important documents and procedure information for your convenience.

See our **2021 TAX TIPS** under the “Documents” tab of our website for help with preparation of your paperwork.

Please call the office before you drop off/email/mail your tax documents for review and processing. Your **engagement letter and consent to disclose** will need to be signed PRIOR to any preparation. You may print these from our website at www.cpagallo.com under the “Documents” tab or request it by email at Barbara@cpagallo.com.

Once your documents are processed, we will connect with you either by phone or email to advise if additional information is required and if we need to schedule time to review and finalize your return. We can no longer prepare returns in person as the process has become too lengthy due to the complexity of tax law changes and we expect additional tax changes due to the ongoing COVID-19 crisis.

Pursuant to IRS guidelines, you will need to sign your 8879 form for electronic filing and any others necessary, **BEFORE FILING YOUR RETURN**. This form will be generated only at the completion of your return. Verbal authorization **will not** be accepted. **Payment is required at the time your return is completed**. Cash, check and credit cards are accepted. A Square link for online payment will be generated at the completion of your return for convenient online payment.

Once signatures and payment is in place, your return will then be filed.

Resources you may find helpful:

Free Apps for your phone will allow you to take pictures of your documents and email or upload to whichever destination you choose. These are available for both IOS and Android systems.

Abode Scan allows both the ability to scan and read documents and sign and return them after returns are completed.

Genius Scan allows you to take photos and convert them to PDF's and also view and sign documents you receive by email.

Other apps clients like are CamScanner, MileIQ to track mileage