

## 2022 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.

We have updated our website to include important documents and procedure information for your convenience. Please review the items under the "DOCUMENTS" tab of the website. The **2022 TAX TIPS** will assist with the preparation of your paperwork.

**NEW FOR 2022 SEASON:** eSignature will facilitate the signing and automatic return of electronic filing documents as well as Engagement Letters and Consent forms. For joint filed tax returns, **SEPARATE** email addresses are required for taxpayer and spouse to be able to sign returns. The Engagement Letter and consent form will continue to be on our website for review and signature if needed at [www.cpagallo.com](http://www.cpagallo.com) under the "Documents" tab or request it by email at [Barbara@cpagallo.com](mailto:Barbara@cpagallo.com). Scanning and returning is acceptable.

Please call the office before you drop off/email/upload or mail your tax documents for review and processing.

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 ongoing 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 and will be sent via eSignature or email.

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 private online payment.

Once signatures and payment is in place, your return will then be filed. Hard or paper copies will be done on request only in an effort to keep costs down as the cost of paper as well as postage continues to rise.

### Resources you may find helpful:

Free Apps for your phone or tablet 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.

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

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

Other apps clients like are **CamScanner**, **MileIQ** to track mileage (subject to software fee).