



Selina J. Ashworth, CPA

January 9, 2021

Hello Clients and Friends,

As we say farewell to 2020, we welcome a new year and say hello to another Tax Season. It is time to start thinking about taxes and watching for your income tax information to arrive in the mail. The IRS will soon announce when we are able to begin processing 2020 tax returns. As soon as you have your information let us know and we will be happy to help you file your return. It is not necessary to wait until you have all your information to call and schedule an appointment time.

We are currently preparing our office for the upcoming tax filing season and have completed your income tax organizer. We have uploaded your tax organizer to our secure portal. If we have your e-mail you should have received a message with instructions for accessing your documents, please let us know if you did not receive the e-mail.

SecureFilePro Document Portal: You will create your own password, or if you used this system last year you will use the same one for accessing the portal. If you do not remember your password, please call or email us at office@ashworthaccounting.com so we can send you a new activation email to reset it.

You can also send us your documents through this portal by scanning your documents and uploading them directly into this portal. After you upload documents it will send a message to my bookkeeper that your information has been received.

Appointments: We offer both evening and Saturday appointments for your convenience, however these are usually the first to go. If an evening or Saturday appointment is important to you, please call right away to secure a time. Available appointments are given out to the first callers, so make sure you plan ahead if you need a specific time or day. Appointments do run out so please call early to get your appointment scheduled. (Usually all gone by end of February early March.) To schedule your appointment, please call 480-945-0623, and Dax will assist you with getting it set up. E-mailed requests for appointments should be sent to office@ashworthaccounting.com, but it is faster if you call the office.

3514 N. Power Road, Ste 127, Mesa, AZ 85215
Phone: (480) 945-0623 * Fax: (480) 945-7717
www.ashworthaccounting.com

We have all experienced a very challenging and chaotic year. With what we currently understand about Covid-19 and how rapidly it spreads, as well as the terms of the quarantine periods from exposure to it, we are only going to do Virtual appointments this tax season for everyone's safety.

Virtual Appointments: We have a secure meeting program called AnyMeeting for our appointments. We will send you a meeting link and pin number for computer access, or if you prefer a phone call, you will also receive a phone number to call and check into the meeting. This platform works like other programs such as Zoom, Teledoc or Facetime. If you experience technical difficulty accessing the meeting, please call our office for assistance.

We need to have your tax information, the completed questionnaire and signed engagement letter received by our office at least three days in advance of your appointment so that we have time to work on your information and be ready for our meeting. You can upload the documents to the portal, email the documents to office@ashworthaccounting.com, mail them to our office or drop them off. If you don't require or want an appointment, you can still send your tax information to us by the same means. Due to the Mesa mask mandate in place at this time, a mask must be worn in our office.

If we happen to be out of appointment times when you call, we are still able to assist you, but you would need to have your paperwork submitted to our office by March 17th to guarantee we can finish it by the April 15th deadline, otherwise it may be extended, although we will do everything in our power to get it filed on time.

Our last tax appointment will be April 7th, so we have time to get all the tax extensions calculated and e-filed by the April 15th deadline.

DocuSign: We are still using DocuSign to assist you with signing the e-file forms that we require to process your tax return. This allows us to electronically send you the signature forms so you can create a signature, which is submitted back to us so we can process your tax return. The live signature is not required.

Audit Protection Insurance: Our office is also offering Audit Protection Insurance again this year. This insurance is optional for you, but due to the increased volume of fraud and identity theft we highly recommend you consider the audit protection insurance. This insurance will assist you with the IRS if there is ever an issue, or it can assist you in restoring your identity if your information is every compromised. The insurance reimburses you up to \$2,500 of expenses caused due to audit or ID theft. The insurance policy for the tax year is \$84.95 and covers the returns federal audit period.

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Website, Blog & Newsletter: We have just developed a new firm website in December 2020: ashworthaccounting.com

Website: You can find important government websites, forms and general information. We have also provided links to our SecureFilePro portal, and Payroll Processing platform on the website. We will be updating this site to keep it as current as possible.

Blog: We are also running a blog with current tax issues and rules, as well as trying to keep up on current tax law changes and updates. There is also a Q&A on our blog if you have questions or information to share with other clients and with our staff. Please do not add any of your personal information to the Blog, as it is not private. If you have specific questions for any blog topic, please contact us directly.

Newsletter: We are also starting a Newsletter. You can sign up directly on the website and can cancel anytime. The Newsletter will provide you with various tax articles and information to keep you up to date on what is changing and evolving in our financial, tax and accounting industry.

Tax CD's: If you would like to purchase a CD or a custom USB drive with a copy of your current income tax return and backup source documents we are providing them with your paper copy of the return.

CD: \$20.00
USB drive: \$35.00

We are only required to keep 3 years of your tax returns and documentation, since all originals are returned directly to you. If you would like to purchase prior years on a CD or USB drive before we purge another tax year from our files, please let us know and we can create those for you as well.

We look forward to working with you and assisting you with your tax and accounting needs!

Sincerely,

Selina J Welle

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