

January 2022

Dear Client,

As another tax season approaches, we continue to face challenges from the Covid-19 pandemic and realize we must be flexible and receptive to change as the situation continues to evolve. However, we assure you that our commitment to you remains strong and focused and we will continue to serve you with the personal attention you are used to.

In the interest of your health, the health of our employees, and our community, all visitors entering our office will be required to wear a mask. Disposable masks will be available at the front desk.

This year we will be offering limited in-person appointments. We will continue to offer phone and video appointments, using Microsoft Teams, as requested. Please take advantage of these convenient options to an in-person appointment. We continuously monitor the situation in our community and will make changes to our appointment policy as we deem necessary.

We highly encourage you to use our Sharefile client-friendly portal for the safe and secure transfer of your tax documents. The link to our secure Sharefile portal is found on our website, under the contact us tab. This will also be a permanent portal for your document storage. If you have questions about this feature, please contact us and we will be glad to walk you through the process.

If you cannot send us your documents electronically, you can mail documents to our office or drop them off inside our office door. This drop off will be available February 1<sup>st</sup> through March 21<sup>st</sup> during our business hours of 8 am to 6 pm Monday, Tuesday, Thursday, and Friday, 8 am to 8 pm Wednesday, and Saturday 8 am to 12 pm, when it is visually monitored by our receptionists.

After reviewing your information, we will be in touch to schedule a phone or video call to discuss.

If less than all your information is available to us on or before Monday, March 21, 2022, please expect your return to be placed on extension. This does not increase your audit risk. However, you need to remember that this is an extension to file and not to pay. Interest will be charged if the tax is not paid in full by the original due date. If your return is extended, please provide all tax information 45 days prior to October 17, 2022, the extended due date of the return.

We will either mail your tax return to you, coordinate a time for picking up your tax return, or electronically deliver your tax return. There will be no signing of documents in our office. We will either mail required documents for signature, or electronically send documents for signature via DocuSign (digital signatures). **We DO NOT file tax returns until we have signed authorization by you.**

We also have examined our fee structure which has not changed since 2018. Unfortunately, our cost to provide the service and guidance you count on has increased significantly. We make a considerable investment in our staff and the tools necessary to navigate the ever-changing tax landscape, which has intensified over the last few years. Tools such as computer hardware, software, research materials and continuing education have become increasingly costly. We also invest significantly in data security measures to ensure the safety of your personal information. After careful consideration we have decided to increase our hourly rates and personal tax preparation rates. This is not a decision we take lightly and realize we all are currently facing inflationary pressure in all cost-of-living expenses. Please feel free to contact any one of the WHS partners with any questions or concerns.

As we continue to monitor the impact of the coronavirus, we will keep you informed of further changes. We value our relationship and your trust, and we will work diligently to ensure accurate and timely filing of your tax returns. During processing, additional staff members may call or email with questions or requests for additional information (see WHS staff list below). Thank you for your understanding and support during this time.

Sincerely,

*WHS, LLC*

*WHS Staff*

Kendall Weishaar

Holly Shipley

Cynthia Harbaugh

Brenda Storey

Claudia Guise

Carolyn Dutterer

John Myers

Colleen McPherson

Brian Etzler

Amanda Copenhaver

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Holly Brown