

RELIABLE TAX SERVICE
PO BOX 30369
MESA, ARIZONA 85275-0369
PH. 480-981-3005 or 480-828-0881
E-MAIL IS: FOX1957@ATT.NET or JIM@RELIABLETAXAZ.COM

Date: 12/23/2020

To: All clients

From: Jim Fox, MBA, EA

Re: Tax year 2020 filing procedures

Hi! This year of 2020 saw us face a ton of challenges, but we've been able to make do in the middle of a crises. For the coming year, in an attempt to make life easier when filing your returns, we've studied many different ways to enhance your tax filing experience and I think we've found the right solutions!

1. Beginning in February of 2020, I began switching my tax software from a desktop-based system to the cloud version. The reason for that is security, which they tell me is "bank level". Along that same line, my software has a feature called Intuit "Link". With Link, you can upload your tax documents to me, directly, right into that secure environment, eliminating the need to e-mail or mail me things. We can communicate that way this coming tax season safely and securely.
2. Within the next week, I'll begin the process of e-mailing you an invitation to sign up for Link. You'll be getting an e-mail from me inviting you to do that, and it'll have a link to the Intuit Link website. Click on that and establish your own, private account thru that portal. I'll be able to see

when you've established that account and, at that point, I'll be sending you a tax organizer for 2020.

3. With Link, even if you don't have a printer or scanner you can still upload your documents to me. You accomplish that by signing into your portal on your cell phone, then taking a picture of the document(s) you want to upload, then click the upload button. It's that simple! If you do have a scanner, then scan the document(s) and upload that way. No mailing no printing, no fuss.
4. When I receive the documents from you, I'll enter that data in the return. If I need more documents, you'll get a notice, by e-mail, that I'm requesting more info. Simply sign in, see what items I'm needing, then upload those to me.
5. Once I've gotten the returns done, I'll send you the docusign e-mail for you to sign the e-file forms. This will be signed **before** I've uploaded the returns.
6. When the returns are complete, and after they're paid for, I'll post them to your portal so that you can retrieve them. You may print them up at your convenience and you'll have access to them all the time. If you ever need a copy of that return, you'll have it available to you 24/7 for no additional charge. However, if you'd like me to mail you a hard copy, a \$10 Priority Mail postage fee will apply.
7. I'll send you a bill thru PayPal for your payment. You can pay by Visa, MasterCard, Discover, American Express, or e-check. Or if you prefer, let me know and I can have you pay with Zelle. All fees will still be due & payable once the returns have been prepared and the late fees will continue to apply if payment isn't received in a timely manner.
8. I know this is way different than in years past but, due to the severity of the covid virus, this is really a good

alternative. I am attaching a link to a YouTube video for you to watch a 5-minute promo about Link. It covers a lot of ground in a short period of time and will help you navigate thru this process. Here's that link to copy and paste into your web browser:

<https://www.youtube.com/watch?v=YLteTFk6WYc>

9. In addition to using Link, some of you may still want to visit with me about your returns. If that's the case, we can still do a limited number of phone appointments and we can do face-to-face tax meetings with Microsoft Teams. With Teams, we can video chat, as long as you have a computer or cell phone with visual capabilities. You don't have to have Teams downloaded on your computer or cell phone, either. If we do a Teams meeting, you'll get an e-mail from me about the meeting and, in that e-mail, you'll have a button to click to "Join Meeting". When you click on that, you're connected!

10. In addition to the normal contact info, I have a couple of new items, too. I have a third e-mail address, which is jim@reliabletaxaz.com. You can use that, too, and may be getting a few e-mails from me from that e-dress, too. Any of the three you have for me is fine. I also have a work cell phone, which is probably going to wind up being the main number. It's **480-828-0881**. And we have a website which is reliabletaxaz.com. I'll be working on that over the next couple of weeks to try to make that as helpful as possible. Happy holidays and be safe out there!