A Guide to Tax Year 2020





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Hello and Happy New Year!



I don't have to tell you how difficult 2020 has been (and 2021, so far) and how the worldwide public health crisis has affected all of us. We have muddled through this difficult year, and we must believe there are better days ahead.

Covid has tested us, and we have had to adapt and change the ways that we shop, work, play, and interact with others. Tax season is no exception. I very much value the in-person approach to client service. However, I also value the safety and health of my clients. Given our current reality, I will not be meeting with clients face-to-face. In anticipation of this limitation, I have been focused on upgrading my technology to better serve my clients in a virtual environment.

I have launched a new secure client portal called TaxDome. I will use TaxDome to manage all tax return projects and documents. You will receive an email from me inviting you to log in to TaxDome. I encourage you to also download the TaxDome app on your phone. In TaxDome, you can securely organize and upload your tax documents and information, view your tax returns, e-sign documents, and manage your communication with me. It is very easy to use, and I hope you will find it helpful. Download Tax Dome QuickStart Guide

I strongly encourage you to upload documents in TaxDome, but I will also accept drop-offs by appointment. You can also mail your documents (note my new address), but please use USPS priority mail (with a tracking number) and keep copies of everything you send to me.

On the tax front, legislative changes have been complex, contradictory, and constant. I am here to make the 2020 tax filing process as easy as possible for you. I strive to help you understand your tax situation and your tax return. I can also help you plan for the future, address unfiled tax years, and respond to IRS notices. <u>Download 2020 Tax Updates</u>

I am not a big sports fan, but I am a fan of theatre. Instead of publishing a Tax Season Playbook, I've crafted a Tax Season Playbill. Let's pray it's light-hearted and not a tragedy and, of course, hope for rave reviews. This Playbill is a guide to managing the virtual approach to tax season. My goal is to not only provide a better understanding of my process but also to help you know what to expect.

We are in this together, and I hope you will return season after season. Encore! Encore!

Thank you for your trust and confidence.

Rich Schultz



I offer tax return preparation and tax advisory services to small business owners and individuals with complex tax situations.

Whether you are joining me for the first time or have been with me for many seasons, I crafted this tax season Playbill to acquaint you with my tax return preparation process and the changes I've made.

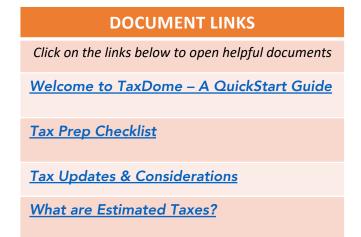
I am here to make the tax return filing less taxing. I don't just plug your numbers into tax forms. I ask many questions. I review prior years and ask about present concerns and goals. I also work with you to determine tax planning needs for the future.

I am available year-round to assist with your tax needs. I don't charge extra for quick and simple responses. However, if a response is more involved or requires research, I will advise you in advance that a consulting fee may apply. I also offer tax planning, representation, and resolution as additional services.

FILING DEADLINES		
<u>RETURN TYPE</u>	<u>MY CUTOFF</u> * (for a timely filing)	<u>FILING DUE</u> <u>DATE</u>
S-Corporation	FEB 16	MAR 15
Partnership	FEB 16	MAR 15
Individual	MAR 16	APR 15
Corporation	MAR 16	APR 15
Trust & Estate	MAR 16	APR 15
Tax Exempt Org.	APR 16	MAY 15

To file a timely return, the data must be submitted to me at least 30 days prior to the filing deadline. If you're not ready to file, I can submit an e-filed extension on your behalf.

An extension extends the filing deadline but not the payment deadline. A failure-to-pay penalty and interest will apply to any tax balance due.





https://schultztaxservices.taxdome.com/



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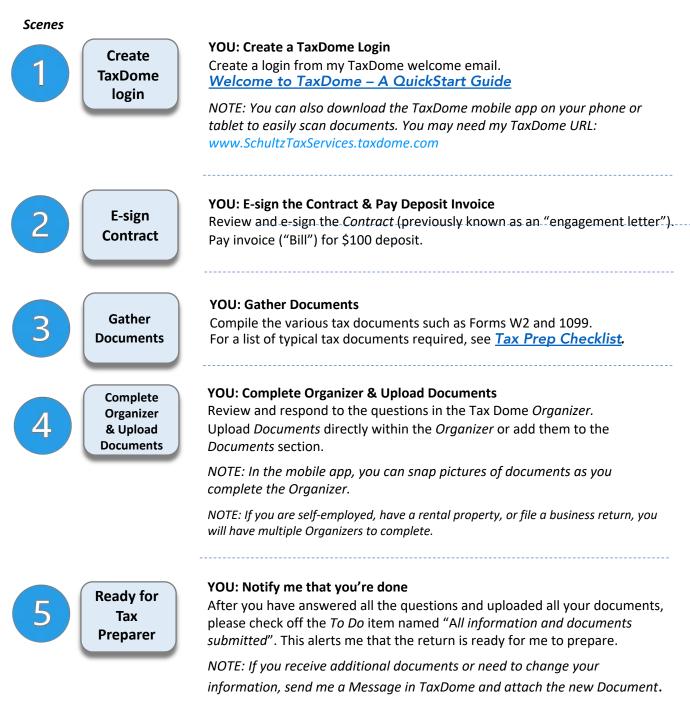
New Address: 3455 NE 12 Terrace, Suite 12 Oakland Park FL 33334



TAX YEAR 2020 IN TWO ACTS

Setting: TaxDome, a virtual world where the client and the tax preparer interact

ACT ONE Featuring you as "the Client" and Rich Schultz as "the Tax Preparer"

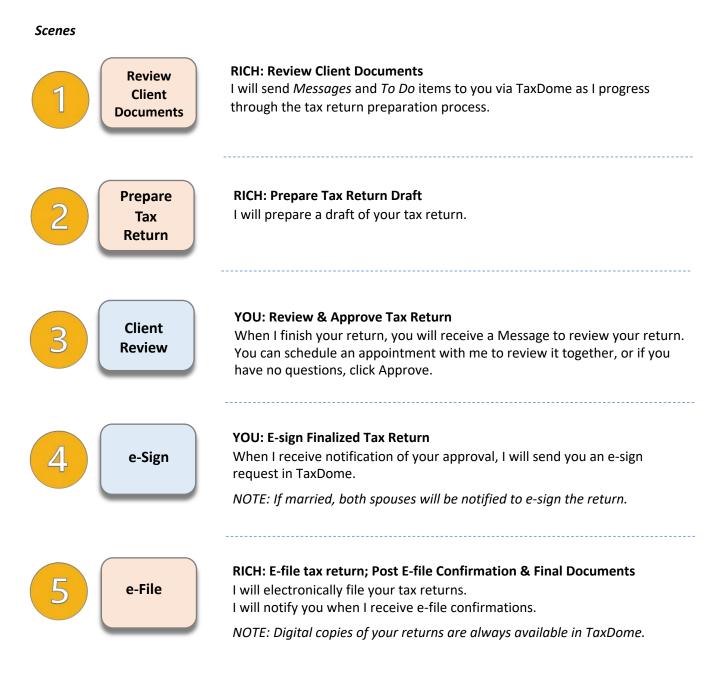




TAX YEAR 2020 IN TWO ACTS

Setting: TaxDome, a virtual world where the client and the tax preparer interact

ACT TWO Featuring you as "the Client" and Rich Schultz as "The Preparer"



Take a bow! You are done!

Personal Reflection

In my journey, I have learned from my family, friends, teachers, colleagues, mentors, and community to value certain traits and behaviors in others. As a small business owner, I know that people want to work and do business with people they trust. Trust is built one interaction at a time and is based on the belief that one's values are shared.

I value the trust you place in me. I strive to incorporate into my business interactions the values of honesty, civility, integrity, candor, positivity, clear communication, confidentiality, vigilance, and accuracy.

These are difficult times, and shared values, especially honesty and civility, are more important than ever as we move forward in social discourse and business relationships.

Rich Schultz



