



Dear Valued Client,

Welcome to the 2020 tax filing season! We want to start 2021 by reminding you how grateful we are that you have chosen The Walls Group to serve your accounting needs. We learned how to pivot and respond not only to what seemed like daily changes to deadlines and tax law, but also to the urgent need to support clients technologically so we could safely and distantly conduct business with as little disruption as possible.

Here are some of the changes we are enacting in 2021 to insure there is no disruption in our ability to serve you safely:

- E-signature on authorization forms – enabling seamless electronic approval to e-file your tax return
- An updated website with clear links to submit paperwork electronically, communicate with our tax experts, set in-person or online meeting appointments and even pay your invoice securely online
- Acceptance of online invoice payments through QuickBooks

Being well organized is extremely important when entering tax season. Providing all applicable documentation sorted and totaled is a time saver for us which ultimately saves you money on your tax preparation invoice. **Please use your client organizer.**

We are continuing to encourage clients to maintain safe social distancing by foregoing meetings unless there is a major change or unusual circumstance this year. If you feel a meeting is necessary, please call the office to set an appointment or use our appointment tool on the website. Please communicate your preference for an online, telephone or in-person meeting. The last day we will be taking appointments prior to the April 15th deadline is Friday, March 26, 2021. Note that there are a limited number of appointments during this time frame, so please schedule early.

As in years past, you may submit your documents directly to our office without an appointment. You are also welcome to use the client portal on our website. Please feel free to reach out if you need any help setting this up. Our after-hours secure drop box located behind the building is available for document drop off and is checked daily.

A few changes for this filing season include the following items:

- Economic Impact Payments are not taxable income; however, you should receive Form 1444 from the IRS which we request you provide with your tax information. There will be worksheets in your tax return to reconcile the amount you received to insure it was the correct amount. If you do not receive this form, please give us the total of the EIP you received so we can complete this reconciliation.
- Even if you are not itemizing, you may report up to \$300 in charitable donations to be deducted. Please provide documentation for these donations even if you do not plan to itemize your deductions for 2020.
- Some forms have been updated or are unusual this filing season. 1099's, W-2's and interest statements from the IRS may be a little different. Rest assured we are staying abreast of changes and are ready to help.

A satisfied client is our most valuable asset. Your recommendation to an associate, friend or family member is our favorite way of growing our business. We sincerely appreciate your patronage and as always, we strive to provide you with professional and efficient service.

Sincerely,

Merilee Daniels

Firm Manager