



Thurzo Spellman Enterprises, Inc.

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RE: TAX SEASON 2020

To Our Valued Client,

As the Holiday Season approaches, we would like to make you aware of some changes we are making in our office for the upcoming tax season. Due to the ongoing COVID-19 health crisis we have determined that we will not be conducting any in person tax appointments for the 2020 tax year.

As a result of this change we will **not** be opening our appointment book in the fall as we usually do. Instead, tax returns will be completed on a first come, first serve basis. All clients will have the option to upload their tax documents through our new client portal, SmartVault (which will allow you to safely and securely upload all of your documents), drop off tax documents at the office, or mail in documents via USPS certified mail. Zoom appointments may be available upon request.

With the retirement of Sharon Spellman from our office, and in order for us to best prepare for this upcoming tax season, we kindly request you call (708-430-8484) or e-mail us (tsenterprises@comcast.net) to make sure we have the most up to date e-mail address and phone number on file with our office.

As you prepare your paperwork please remember:

- If you obtain health insurance from the marketplace, you must **provide your 1095A**.
- If you have **stock sales please send us the 1099-B** with supporting information

Your tax return will not be filed without proper documentation and please remember we are required by law to electronically file your return.

Due to the changes in tax law, we strongly urge all of you to **complete the enclosed tax deduction finder** and upload or send with your documents. We would also like to remind you that if you don't have a financial planner at this time and you are interested in making an appointment for Financial Planning, we recommend contacting: **Koney Wealth Advisors at 708-349-1001**.

At this time we are unable to make a commitment on cost for the upcoming season. As always we will do our utmost to hold the line. Please remember that our office procedures are as follows:

- **All paperwork will be held until payment is received in full.**
- All paperwork must be received by April 1st or we will not guarantee the return will be completed by April 15th and may need to be put on extension.
- For your convenience we now accept **Visa, MasterCard, Discover and American Express**.

As in the past, we keep striving to serve YOU, our Client, with the latest and most innovative sources and materials available.

Happy Holidays!

The Staff of Thurzo-Spellman Enterprises, Inc.