



David F Alfano, CPA

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January 11, 2021

Dear Client,

It may have felt like the day would never come – but we have finally turned the corner, leaving 2020 behind us! We hope 2021 has found you and your family relatively happy, healthy, and unscathed. Though there may be things about the year ahead that feel uncertain or unclear, we are hopeful that things can only get better and we are grateful for the opportunity to help you with your 2020 tax preparation so we can truly close the book on the year!

Facing a pandemic in the middle of tax season was surely something we never expected! We are thankful to each of you for your flexibility, for embracing our client portal and phone call appointments, and for bearing with us as we converted to working remotely to keep our staff and clients safe.

While we are eager to open our doors and welcome you back into the office, we do not want to do so until we can keep even our most vulnerable clients and team members safe. As a result, we do not foresee the office being reopened to the public before the end of tax season. Of course, that doesn't mean we aren't ready and able to assist you! We have installed a drop box outside the office door where you can drop off your information. Preferably, though, we ask that you please utilize our secure **Client Portal**.

Additionally, while we still offer the option for a paper copy of the return, the associated printing fee has increased to \$35 to accommodate the shipping and handling that will now be required. **All paper copies of returns will be delivered via USPS**; there will be no option to pick up a copy while our office is closed to the public. Just like last year, though, please be sure we have your up-to-date e-mail on file so that you will be properly notified when your return is in the portal and ready for your review. Don't forget, once your return is in the portal you can access it any time you may need a copy; and if you have been utilizing the secure portal for the past few years, you'll even have access to previous years for reference. **Keep your sensitive information secure**; we encourage all of you to utilize the portal for transferring your tax documents to our office as soon as you have them gathered.

Let's make the 2021 filing season as painless as possible! Review these tips to have your best tax season possible:

- **Returns are prepared in the order in which they are received:** please provide your tax information as early as possible to avoid the deadline crunch, eliminate any last-minute problems, and ensure a quicker turn-around time.
- **Save the phone call for reviewing your return!** It is not that we don't want to talk to you, we just want to save you some time! Based on the experience of our clients, we feel you may benefit more fully from a phone or video conference appointment to *review* your completed tax return instead of talking with us at the beginning of the preparation process. Please **upload your information into our secure portal** and we will get started on your tax preparation right away! Throughout the preparation process we will contact you with any questions or concerns. Once the return is ready for review we can schedule a time for you to discuss the results with you before the return is filed.



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- **Information is due to our office prior to the deadline:** *complete* personal, trust, and c-corporation tax information must be provided to our office by **March 22, 2021** to be filed by the deadline. (Information for the preparation of partnerships and s-corporations, which are due March 15th, must be received by **February 22, 2021**).
- **Don't forget outstanding information:** should our office request any missing information, this must be supplied by April 1st to guarantee a timely filing for personal returns. **If your tax information is received after these deadlines your tax return will automatically be put on extension and you may be charged an expediate fee.**
- **Don't forget to contact us for an extension:** unless requested, we will not automatically prepare an extension for any client; please contact us as soon as you think you may require an extension. Please note: **there will be a fee for calculating the amount to pay with an extension for any information provided after March 22, 2021.**
- **An extension is of time to file, NOT time to pay:** all payments are due to the federal and state governments by April 15th or you will incur unavoidable penalties and interest.
- **All returns must be e-filed:** if you are interested in receiving any potential refund as quickly as possible please **include a voided check** with your tax information and we will **have the refund directly deposited into your bank account.**

On page three of this letter, you will find a helpful calendar of all important dates, and additional information to remember for this upcoming tax season.

Thank you in advance for helping us make each tax year better and better! We look forward to seeing you soon.

As always, we appreciate your referrals. Adding your family and friends to our client list is, by far, our most gratifying source of growth.

Sincerely,

Alfano & Company, LLC



January

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

✘ 01/15/2021 DUE DATE:
Final 2020 estimated tax
payment due

**✘ 02/01/2021
DUE DATE:**
Mail or distribute
W-2s & 1099s
to recipients

02/22/2021
**ALL S CORPORATION &
PARTNERSHIP INFO
DUE TO OUR OFFICE**

February

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28						

March

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

**✘ 03/15/2021
DUE DATES
FOR S CORPORATIONS
& PARTNERSHIPS:**
-payments
-tax returns or extensions

03/22/2021
**ALL PERSONAL, ESTATE & C
CORPORATION INFO DUE
TO OUR OFFICE**

April

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

✘ 04/01/2021
Any outstanding information due
to our office

**✘ 04/15/2021
DUE DATE FOR INDIVIDUAL &
PARTNERSHIPS:**
-payments
-tax returns or extensions
-first 2021 estimated tax payments



Don't Forget:

- SSNs and dates of birth for all family members (including any children born in 2020)
- Original W-2s & 1099s (interest, dividends, retirement or other income)
- Cost basis for stocks sold
- 1098(s) (mortgage interest)
- Real Estate Taxes and Car Taxes Paid
- Business & Rental Income and Expenses (email us to request a helpful organizer!)
- Legal Docs for sale or purchase of real property
- Other Itemized Deductions (i.e. donations & medical)
- Form 1095 (Healthcare Coverage)
- K-1(s) from businesses, estates/trusts, & investments
- Contributions to pension or retirement plans
- Amounts & Dates of any estimated taxes paid
- Void Check for Direct Debit or Deposit



You Should Know:

- Preparation fees are due before your tax return is e-filed
- Returns are processed in the order they are received
- Optional audit correspondence is available
- E-filing is mandatory
- You must contact us to request an extension; taxes due must be paid with the extension
- Call to request a tax organizer
- It is your responsibility to review all returns before signing
- You can upload your tax documents to our secure portal!
- **Never Email SSNs or Bank Information**