ALFANO
& COMPANY LLC
www.alfanocpa.com

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January 10, 2022

Dear Client,

We hope that you've had a happy and healthy start to the new year and we are grateful to begin 2022 by your side! Although the economic woes of the current pandemic have not quite left us yet, we want to assure you that your financial needs continue to be our top priority. That being said, we are looking forward to helping you with your 2021 tax preparation!

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. Therefore at this time, 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 a secure drop box located outside the office door where you can drop off your information. This can be found to the left of our mailbox, with our logo on the front. Preferably, though, we ask that you please utilize our secure **Client Portal** to provide us with your tax documents.

Starting this year, Alfano & Company LLC will be going paperless! All completed tax returns will be uploaded directly into your secure portal upon completion and paper copies will not be provided. This provides an extra layer of security to ensure vital information is protected, and allows you to access your tax information instantaneously. **If you do not have an email, we can provide you with paper copies of your return.** 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 2022 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 21, 2022*** 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 14, 2022***).

- **As always we'll need an annual engagement letter and questionnaire completed:** Click here to access the forms for your personal tax return, and here for the business tax return forms.
- **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 21, 2022.**
- **An extension is of time to file, NOT time to pay:** all payments are due to the federal and state governments by April 18th 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**.

The following page contains a helpful calendar of all important dates, and additional information to remember forthis 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

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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 / 30	24 / 31	25	26	27	28	29

February

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13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28					

01/17/2022 DUE DATE: Final 2021 estimated tax payment due

01/31/2022 DUE DATE: Mail or distribute W-2s & 1099s to recipients

02/14/2022
ALL S CORPORATION & PARTNERSHIP INFO DUE TO OUR OFFICE

March

S	M	T	W	T	F	S
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6	7	8	9	10	11	12
13	14	15	16	17	18	19
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27	28	29	30	31		

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

03/15/2022
DUE DATES FOR S CORPORATIONS & PARTNERSHIPS:
-payments
-tax returns or extensions

03/21/2022
ALL PERSONAL, ESTATE & C CORPORATION INFO DUE TO OUR OFFICE

04/01/2022
Any outstanding information due to our office

04/18/2022
DUE DATE FOR INDIVIDUAL & PARTNERSHIPS:
-payments
-tax returns or extensions
-first 2022 estimated tax payments

Don't Forget:

- ☐ SSNs and dates of birth for all family members (including any children born in 2021)
- ☐ 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**