Thank You for Trusting Tax Happens LLC with your Tax and Accounting Needs!

It's that time of year again and we look forward to hearing from you very soon. 2020 was a challenging year for all of us. We hope you had a great year and stayed healthy. With the challenges of 2020 came many new tax considerations along with new office processes and procedure. Please take the time to review this email and relevant links. We have tried to set up a system to allow for the unexpected and smoothly transition from working in the office to working from home as needed.

Please review this information and the links below. If you have any general questions, need the TaxDome activation email or a personalized organizer prepopulated with last year's information please email TaxTeam1@TaxHappens

Daily client call hours - We are open and back to working from the office most days. To run more efficiently and accommodate clients in a more timely manner Monday through Friday from 4:30PM to 6:30PM is Theresa's client call time. If you request a call you can expect a call back the same or next business day at some time during this two-hour window. If you need a call on a specific evening or after a certain time just let us know. If you request an appointment Theresa will plan to call you during this time prior to scheduling an appointment. We are only having in-person appointments when absolutely necessary. We now offer video conference calls.

Document submission - You can submit your documents anytime electronically (preferred, see below), drop off via the mail slot in the office door or mailed via USPS or similar.

Coming to the office – If you need to come into the office or if your documents will not fit through the mail slot. it is best to call or message first. The office door is kept locked, we now have a Ring Doorbell and we are only allowing one client at a time into the office. Plan to wear a mask and please do not come into the building if you are not feeling well or have been exposed to COVID. If needed or preferred, we can meet you in the parking lot so you don't have to come into the building. Just let us know so we are available when you come by.

Please review this information and the links below regarding Tax Dome. If you have any general questions, need the TaxDome activation email or a personalized organizer prepopulated with last year's information please email TaxTeam1@TaxHappens

PLEASE NOTE THE FOLLOWING NEW NUMBERS: **Phone:** 813-603-2073 **Fax:** 813-603-2074 **Text:** 813-603-2075

New Client portal and communication system - TAX DOME – We have a new client portal where you can securely communicate us via messaging, electronically complete the organizer, share documents, sign documents, make payments for services, see your invoice and determine your balance owed for services. It offers far more than the previous portal. This system also allows both spouses or multiple business partners to utilize a separate log in and usernames connected to their unique email address. Here is a link to a short video explaining how it works. https://www.youtube.com/watch?v=cnQ3yKHeBJc

Tax Dome is the preferred method of submitting documents and communicating. This will make the work flow smoother, easily transitions for my team to work from home should the need arise again and allows you and me access to all your documents from anywhere. As always, if preferred, you can still drop off at the office anytime. If the office is closed when you come by you can utilize the mail slot in the door. If coming into the building everyone is required to wear a mask.

To prepare for the preparation of your tax return:

1. Please activate your Tax Dome account. If you have not received an email FROM Tax Dome asking you to active the account, please email to request one.
2. Complete the required organizer and submit all documents via the electronic interactive client organizer in Tax Dome. In Tax Dome under the "Organizers" tab look for and complete the organizer called "2020 Client organizer required for ALL 1040 individual tax returns".
3. Sign the required engagement letter. In Tax Dome under the "Contracts" tab.
4. Once you have completed everything and submitted all or most documents please message me via the messaging feature in Tax Dome to let me know you have submitted all or most documents.
5. Pay the required 50% deposit. If 2020 is similar to 2019 your fee will be the same. You can now pay and see your outstanding balance in Tax Dome.
6. Note internal deadlines to assure completion by the tax filing deadlines
   a. Information is needed by **Friday MARCH 12TH** for personal returns **(Form 1040)**
   b. Information is needed by **Friday FEBRUARY 12TH** for business returns **(Form 1120S & 1065)**
7. Once all documents are received and reviewed Theresa will let you know if anything obviously missing and approximately how long until the return is completed (Generally 10 to 15 business days).

We would prefer to utilize Tax Dome whenever possible as it is the most secure and efficient method of sharing documents and communicating. We realize this may not work for all clients. If necessary, you can still find the client organizer, engagement letter and many other helpful documents at https://taxhappens.com/documents-forms/ - you can print and drop off at the office anytime.

Fees for services:

We require 50% of the fee prior to beginning the return and the balance when the draft is provided. Once we have all (most) of the information required to complete your tax return and prior to preparing your return we will determine the fee for our services and the approximate date your return will be completed., If you are a returning client and everything is similar to last year the fee will be the same. Payments can be made using any of the following methods:

- In your Tax Dome account
- Online via this PayPal link
- Using the "Cash App" on your phone you can send payment to TaxHappen
- Check can be dropped off anytime or mailed
- Cash is accepted during office business hours only. Please call before coming to the office so we can plan for your visit.

Extension of Time to File:

- If you know you will not be ready to submit your information by the internal deadlines mentioned above, please let us know as soon as possible and we will prepare an extension of time to file your return.
- AN EXTENSION GIVES YOU ADDITIONAL TIME TO FILE YOUR TAX RETURN. AN EXTENSION DOES NOT EXTEND THE TIME TO PAY THE TAXES OWED. PENALTIES AND INTEREST ARE APPLIED TO TAXES PAID AFTER THE APRIL 15TH DUE DATE.
- IF YOU NEED AN EXTENSION AND THINK YOU MAY OWE PLEASE GIVE US AS MUCH INFORMATION AS YOU CAN. IF YOU THINK YOU MAY OWE BUT CAN NOT PAY ANYTHING LET US KNOW.

If you have any friends or family in need of our services, please forward this email along.

Deadlines:

Tax Happens has the following deadlines for submission of documents to us in order to allow enough time to prepare a complete and accurate return by the due date. If information is received after these dates, we cannot assure completion by the applicable due date.

- JANUARY 15 PAYROLL AND 1099
- FEBRUARY 12 S-CORPORATIONS & PARTNERSHIPS – TAX FORMS 1120S & 1065
- MARCH 12 INDIVIDUAL TAX FORM 1040
- MARCH 12 CORPORATE TAX FORM 1120
- APRIL 15 TAX EXEMPT FORM 990 SERIES
- AUGUST 5 EXTENDED S-CORPORATIONS & PARTNERSHIPS TAX FORMS 1120S & 1065
- SEPTEMBER 10 EXTENDED INDIVIDUAL TAX FORM 1040
- OCTOBER 8 EXTENDED TAX-EXEMPT FORM 990 SERIES