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August 2022 Tax & Business Alert



It's hard to believe that school will be starting for many soon. Seems like we just got started with summertime activities. Looking ahead, we have a few things in the works that we wanted to make you aware of.

We are always looking for ways to improve our service to you, our clients. We have acquired and are **in the process of implementing a new client management software.**

Some of the many benefits for you include:

- There will be **secure individual portals and the ability to use an app on your phone.** You will be able to put documents on the portal for us to use, and you will be able to retrieve documents - such as your tax returns - in that portal as well. The **portals will be personalized** and no one but you and our staff will have access to it.
- You will have the **ability to sign documents electronically** such as the E-File Signature Authorization Form.
- There will also be a provision to **pay our invoice directly** using a credit card or e-check - no more filling out and sending back a credit card authorization form or having to call our office to make a payment.
- We are also very excited about the **encrypted email and messaging capability.** We will be able to send messages to you and you will be able to send them to us as well - all encrypted!

Our goal is to have this fully functional for the 2023 filing season. Watch for additional information in our e-news as we get closer to 2023. Hopefully, you will find this advantageous.

A reminder that due to increased costs, I am having to increase fees this year; however, if we can get your supporting documents by August 15th, our fee increase will not be as high as it would be if you wait until after that date.

A FEW FRIENDLY REMINDERS

- Please remember that **payment is due upon completion** of your tax return, financial statements, or any other services we provide.
- If you brought **supporting documents** to us for the preparation of your tax return and we have completed your return, **please pick them up ASAP.**
- **If you need your supporting documents and/or return mailed, please note that there is a \$30 fee.** Due to the sensitive information on these documents, they must be sent via Certified Mail.

Thank you for understanding our policies and procedures.

OFFICE HOURS

Monday-Thursday 8 a.m.-5 p.m.*

Friday - OFFICE CLOSED, but our staff works REMOTELY from 8 a.m.-Noon

*Our staff takes lunch from 12-1 p.m., but a staff member is available during lunch should you need to drop off or pick up any returns or supporting documents



AUGUST 2022 TAX & BUSINESS ALERT

- WHEN IS EMPLOYER-PROVIDED LIFE INSURANCE TAXABLE?
- SHOULD YOU DIGITIZE YOUR TAX AND FINANCIAL RECORDS?
- TOO MUCH INVENTORY AT YOUR BUSINESS? TRIM THE FAT!
- A FAMILY BUDGET FOR YOUR NEEDS - TODAY AND TOMORROW

We value you as our client and hope that you find some helpful information in this month's e-newsletter.

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E-MAIL LINKS FOR OUR STAFF MEMBERS ARE BELOW:

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