

PREMIER ACCOUNTING SERVICES, PC

Certified Public Accountants

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Tax Return Procedures for Tax Year 2021

Hello Clients. It's Tax Time again!

Our "No In-person Appointment Policy" is continuing for 2022. As in the past two years, in place of in-person appointments we ask that you either drop off your tax documents into our locked drop box; mail them in; or upload them to your secure portal account.

Please be aware that tax preparation fees for 2021 returns are now a *minimum* of \$300 per return. Returns with business, rental, or multiple schedule D's will be more. Preparation fees for student dependents will be a *minimum* of \$100.00. While we never like to raise our fees, in order to continue to provide exceptional professional service we practically had no choice due to escalating technology and compliance costs we are facing.

This year we will not be scheduling a "drop-off" date for you. Instead, please **wait** until you are sure that you have received **everything** needed for us to prepare your tax return and then provide your documents to us. Receiving your documents at multiple times will result in delays and additional preparation costs.

Typically, early to late February we receive an extremely high volume of client documents and processing times will take longer due to the volume. We will do our best to keep you posted of any significant delays. **PLEASE NOTE:** Any documents dropped off after March 15th may result in your tax return needing to be extended.

The following outline details the tax return preparation procedures and the various methods to provide your tax documents to us:

1. **DROPPING OFF or MAILING IN DOCUMENTS**

- a. **Remove documents from envelopes and remove staples** - Remove your documents from the envelopes they came in and remove any staples. This will help us to efficiently process your documents for tax preparation. We will scan all pertinent documents so anything in envelopes or stapled will result in an increase in processing time and cost.
- b. **Total medical bills, expenses, and donations** – Please only provide a **total** for medical costs, other expenses, and donations. It is not necessary to supply every receipt, bill, EOB, expense, or donation confirmation. Lists are fine as long as they are totaled. Individual bills, expenses, EOBs, and donation receipts however are not required to prepare the return and could result in additional preparation fees if we need to go through and total them.
- c. **Questionnaire and Tax Organizer** – **We do require you to complete and submit the questionnaire included with this letter.** If you need a complete tax organizer, you can locate and print one from our website at www.premieraccountingpc.com under "Resources" tab. Please call if you want an organizer sent.
- d. **Dropping Off** – When dropping off your documents please place them in one of the two lock boxes located outside the office at 40 N. Woodbury Road, Pitman, NJ. All documents should be in a large envelope, so they stay together. The lock box is available 24 hours a day, 7 days a week and emptied at multiple times each day.

e. **Mailing** – Documents can always be mailed to Premier Accounting Services, P.O. Box 89, Pitman, NJ 08071. If mailing however we strongly suggest you use priority mail in order to track the delivery.

2. **UPLOADING**

a. If you have digital copies of your tax documents, you may upload them to your secure client portal account. **PLEASE NOTE:** *We are in the processes of updating our portal to hopefully make it easier for you to use. This will include inviting you to start a new account on a new platform. We anticipate this will be ready within two weeks and will send you an invitation to create your **new** portal account with us.* Creating your new account should only take a few minutes. However, after you receive the invitation, please contact us if you are not sure of how to create the new account.

b. Please review the information in b & c above in Dropping Off/Mailing In with regards to medical expenses and the tax organizer.

3. **EMAILING**

If you would prefer to email your documents to us (less secure option), please email your documents to this address – **TaxInfo@pascpas.com**. **Only** email documents to your CPA/preparer directly if it is in response to a request or question from them. Also, all documents emailed to us must be password protected.

4. **WHEN WE PREPARE YOUR RETURN**

If there are any questions when your tax return is being processed, your accountant/preparer or a staff member will call or email you, and if necessary, schedule a telephone conference or a zoom meeting to go over those questions.

5. **AFTER PREPARING YOUR RETURN - SIGNING AND EFILING**

a. Once your tax return is complete, the return and 8879 Authorization form or forms for E-filing will either be sent to you electronically; mailed to you; or we will call you to come pick them up for review and signing.

b. We will Electronically file your tax return once we have received your signed 8879 Authorization to E-file form (either hard copy or electronically signed copy). If you are signing a paper Form 8879 Authorization to E-file form, either drop in the locked drop box or mail it to us.

c. **IF** you have additional questions or concerns, please **DO NOT** sign the 8879 to allow us to e-file until those questions or concerns are addressed. Instead, contact the office and we will either schedule a telephone conference, communicate through email, or set up a zoom meeting to address those questions or concerns.

6. **PICKING UP IN PERSON - PROTOCOLS**

- If you are not vaccinated, please wear a mask/face shield in the office.
- Utilize hand sanitizer upon entering and leaving our office.
- Refrain from entering the office if you are experiencing any symptom of the Covid-19 virus (or another illness), including headaches, fever or chills, cough, shortness of breath or difficulty breathing, fatigue, muscle or body aches, loss of taste or smell, sore throat, congestion or runny nose, nausea or vomiting; or have come in close contact to someone with these symptoms in the past 10 days.

As always, anytime you have a question or concern, we are available via telephone at 856-256-0330.

Sincerely,

John J. Fitzpatrick, CPA

Joseph H. Wisniewski, CPA

Heather Tierney

Rachel Furman

Michele Cressman and the Staff of Premier Accounting Services, PC