

# 2021 APPOINTMENT OPTIONS

Dear Valued Client:

January 14, 2022

We all thought 2020 was a very challenging year, but 2021 didn't seem to get much better! I struggled with this decision for some time and finally decided that I don't have the right to expose my staff, their families or even myself to whatever viral variant might be rampant at any point in time this tax season. So, we will once again avoid in-person appointments. Yes, I'm also saddened and disappointed by this ongoing situation, but I just don't feel there's been enough research to state with great certainty that being vaccinated and wearing masks is all the protection we need. Our 2021 appointment options are the same as last year and are listed below.

We hope that one of these alternatives will work for you. We are trying a new supporting software this year because we found that having your tax documents here 2 weeks before your appointment really expedited our preparation and processing routine. Our secure online portal, VeriFyle, is still available to upload your documents. If you are a previous user, your user name (email address) and password are still valid. If you don't remember your password, you can always change it. We will have the 2021 Taxes Workspace available for you. If you are a new user, please call and request an invitation link.

## 1) Virtual Appointment

This year we are going to use Teams for our computer face-to-face meeting. You will need to have a device with a camera and speaker (computer, tablet, smart phone). Your device will need to access the internet and your email. You are to call our office to schedule a one-hour time slot. We will send an email with the link to that meeting. You shouldn't need to download anything for computer use as the provided link is working through the internet. If you are using a tablet or smart phone you may be asked to download an app. You will be able to see and speak to your preparer during that meeting.

## 2) Telephone Appointment

You will call us to schedule a one-hour time slot that is at least 2 weeks later than the date we get your tax documents. We will call you at the appointed time and you will be able to speak to your preparer during that meeting.

## 3) Drop Off

We have a locked Drop Off box outside our front door. There will be some envelopes and a pen so that you can put your documents in one secure envelope and label it before dropping it into the box. We empty the box every morning and evening.

## 4) Mail In

Our street mail is delivered daily (6 days during tax season) and our PO Box is also picked up daily.

For most of you, one of these 4 options will work. Last year we thought this would be a one-time inconvenience but, obviously, there isn't enough factual knowledge about this virus. One very positive thing that has resulted from these alterations is discovering how valuable to us it has been to have your documents before we meet.

Thank you for your continued understanding and patronage. If Congress stays in their sandbox this year we might have a semi-normal tax season. How unique!!

The Accountant's Office & Jiffy Tax Shop staff

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