

Happy New Year!

January, 2022

Due to ongoing concerns with the spread of COVID and the Omicron variant, we will once again be completing your tax returns 'virtually.' For those of you who have already made an appointment, we will be in touch to see how you would like to handle this year's appointment – or you can certainly give us a call to discuss your options. We can email you a link for a web conference, we can use FaceTime, we can call you or we can just complete the return, contacting you with any questions.

We are asking that you furnish your information to us at least 2 days prior to your appointment time so that we have a chance to go through it and complete the preliminary work. We can then spend the appointment time reviewing the return with you, ask any questions we have and answer any of yours.

We have multiple ways for you to provide your information:

- You can **upload your documents to our secure portal**. Some of you already use that – just log in to **mySmartVault.com** and upload to the **2021 Client Source Documents** folder. If you are new to that system, please call the office and request an 'invitation.' You will be able to securely upload your documents and will have 24/7 access to them and to your tax returns.
- If you are not comfortable with that, you can always **mail your documents to us** – you may want to make a copy of them prior to mailing.
- You can **fax them to us** at (218)477-8182.
- You can drop **them off at the office**. There is a mail slot in our front door where you can drop them off securely at your convenience.

If you plan to make an appointment and have not already done so, please call our office as soon as possible as we are booking up quickly! You can schedule a time with either Jane or Dave. And you always have the option to just drop your documents off (or upload them) at any time and we will complete them in the order that they are received.

After your return is complete, we will either: upload it to the portal and then request electronic signatures, or we will mail it out to you.

However you provide your documents, please, please fully complete and sign the worksheet. It will eliminate many, many phone calls!

Due to multiple tax changes, the IRS backlog with prior year issues and the advance payments that will need to be reconciled on the 2021 tax returns, we are anticipating another challenging tax year. We value our clients and strive to provide accurate tax returns at a reasonable price. This year, we have needed additional time and training to keep current on all of the tax changes, we've needed to pay attention to COVID protocols, and frankly, it just costs more each year to run a business. And so, we have made the decision to adjust our fee schedule in order to provide you with the service you deserve.

Thank you very much for your past business – we are so grateful! We wish you all the best in 2022!

JBA Tax Preparation, LLC