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VERY IMPORTANT INFORMATION - PLEASE READ THIS ENTIRE LETTER

January 9th, 2022

Dear Taxpayer,

It is time to schedule an appointment for your 2021 Tax Return. Our goal is to make your tax filing easy and 100% accurate. To do this, we need your help.

The past few years have been challenging for most tax offices. We have been overwhelmed with the changes in tax code and tax agency's ability to keep up with these changes.

Many clients will see significant fee increases this year. There is simply more time involved. There are some things you can do to help keep fee increases to a minimum:

- Fill out our tax organizers **COMPLETELY**. Do not leave **ANY** question unanswered. When we must follow-up on unanswered questions, it takes time, and going forward, we must charge for that time.
- Use only **OUR** tax organizers for your rental properties and self-employment income. When we accept data in other formats, it takes additional time to decipher. Exceptions: We will accept organized spreadsheets for 3 or more rental properties and QuickBooks reporting for self-employment.
- **Do not provide receipts** for medical, charitable, business, rental property, property tax and DMV expenses. Simply **enter the amounts in the Tax Organizers** and keep the receipts for your personal records. Every document we open consumes time.
- Deliver/upload all your documents at once. If you are waiting on just 1 or 2 documents, go ahead and upload most of your items, and indicate on your tax organizer that there are more documents coming. We will not start your return until we have all documents and tax organizers for your file.

Our goal – Receive taxpayer documents and tax organizers 5 business days prior to scheduled appointment. Allow us those 5 days to work on the return and ask any questions we have. Review and deliver your tax return during your 30-minute appointment.

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Tax Organizers – Scheduling Appointments – Getting Documents to Us

1) TAX ORGANIZERS

- **Personal Tax Organizer** – Tax Organizers will be required by every taxpayer this year – no matter how simple your return is.

Important – It is imperative EVERY question is answered. We logged over 1,700 phone calls/emails last year following up on incomplete organizers. If we must follow-up on unanswered questions, it will affect the cost of the return and its timely completion.

- **Rental Property Organizer** – To improve reporting accuracy, we now require rental property data be input in our Rental Property Organizer. If you have 3 or more properties, we will accept a spreadsheet. *We will no longer accept property manager reports (they do not include items like HOA fees and insurance).*
- **Self-Employed Organizer** – If you have expenses related to self-employment income, we require this organizer be complete. There is also a place for your home office and auto mileage/deductions.

2) APPOINTMENTS

We are only able to offer one 30-minute appointment per tax return this year. If you prefer to spend your appointment time reviewing your completed return, we require your tax documents at least 5 **business** days before your appointment.

[CLICK HERE](#) to schedule your appointment. Please schedule with the same tax professional you used last year.

If you do not require a tax appointment this year, we will complete your tax return once all documents have been delivered/uploaded.

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3) GETTING DOCUMENTS TO US

We offer several convenient ways to get your documents to us:

1. Upload to your secure **SmartVault Portal**. Your username is your email address. If you have never used this system, contact us at 760-618-1099 to establish a portal for you.
2. Drop documents at our tax office Monday – Friday between 8:30am and 5pm.
3. Mail documents to our office. We recommend making copies prior to sending.

Top Questions:

1. ***“What will your fees look like this year?”*** - Our tax prep fees will increase this year. Much of the increase will be based on the time it takes to prepare your tax return. Taxpayers that have new elements of the tax code apply to them or who provide incomplete data will see the highest fee increases.

We are implementing a minimum fee of \$295 for all returns – including dependent returns. We recognize our fee increases may not work for some clients. While we appreciate everyone’s business, we must make changes to manage our workflow and offset costs associated with the additional time required to complete each tax return.
2. ***“I don’t know when I will have all my documents. Should I book now?”*** - Yes. Our most popular appointment times go fast. We recommend scheduling ahead to ensure a convenient time. Appointments are on a first come basis.
3. ***“Can I file an extension, so I have more time to prepare?”*** Yes. Notify Troy or Paul by email and we will file an extension. An extension only provides an extension of time to file. If you think you will owe, you will want to make an estimated tax payment prior to the filing deadline.

We are expecting another extremely busy tax season. Thank you for taking the extra step to organize your documents for us this year. It helps us a lot.

Sincerely,

San Diego Tax & Financial Associates



Tax Preparation Checklist

- Personal Tax Organizer is 100% complete and all taxpayers have signed the engagement letter. We require actual signatures on the final page.
- Self-Employment Income - Self-Employment Tax Organizer is complete, including the auto and home office expense info on page 2.
- Rental Property Income - I have completed the Rental Property Tax Organizer or provided a spreadsheet that lists all income and expenses on one page
- I have gathered all my Tax documents (1099's, W-2's, etc.) and will deliver or upload to the tax office 5 business days prior to appointment.
- I am not submitting receipts for charitable, medical, business expenses, property taxes or DMV. All this data has been input on the tax organizers.
- If I paid for Dependent Care for my children, I have provided the Name, Address, Phone Number and Tax ID for each care provider in addition to amounts paid.
- New Clients – Deliver a copy of prior year tax return 5 business days before tax appointment with tax documents
- Require an Extension – I have submitted my request in writing by email to my tax professional and received a confirmation (may take up to 7 days for the confirmation).