



TAX SEASON PREPARATION & TAX ORGANIZERS

Video: Tax Organizer Explained - [CLICK HERE](#)



Another MUST WATCH video, which will answer the questions below regarding the status of your Tax Organizer, along with current changes, explanations and expectations.

Although many tax laws are the same this filing season, the IRS is on the lookout for certain items this year and we want to make sure you aware of them.

- When will I get my Tax Organizer?
- Do I need to sign the tax return engagement letter in the Organizer and answer the questions in the Organizer?
 - No tax return will be filed without these questions being answered
- Do I need to fill everything out or can I just send my documents?
- Can I mail information? *Yes, but we **strongly encourage and prefer scanned and emailed/uploaded documents, not pictures***
- What is the IRS looking for this year?

Please continue to stay tuned for more videos and newsletters to come.

Stay safe and healthy,

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Reach Out To Us

