Welcome to 2020! The IRS confirmed it will begin accepting returns on January 27th, which means tax season is right around the corner. To make this season run as smoothly as possible, we have updated our process and are including the details below. We have also created a "Client Resources" section on our website with links to our most important items. To view and download the items discussed below, go to our homepage (www.runyancpa.com) and scroll all the way to the Client Resources section at the bottom.

Items to Note

1. Providing us with complete data is a quick and easy way of keeping your preparation costs down. Another is getting back to us as soon as possible with answers to any questions we may have.

2. If you are unable to get your personal information to us by March 12, please let us know so we can file an extension for you.

3. Instead of including your engagement letter, tax questionnaire, and organizer in this email, we've put it on our website for you to download at your convenience.

4. New for this year, we are emphasizing exit meetings over input meetings and won't be scheduling input meetings. If you believe it would still be helpful to discuss your taxes with Jim before we start preparing your return, we can schedule a 15 minute phone conversation.

runyan + associates

Tax Season Logistics

Please note: we are unable to begin work on your return until we have received both your signed engagement letter as well as your completed questionnaire.

Information Deadlines

- The deadline for tax information for business tax returns is Thursday, February 6.
- The deadline for tax information for individual tax returns is Thursday, March 12.
- We can accept K-1s after this date, but all other information must be received by then.

If we receive your information after the above deadlines, we will file an extension and prepare your return after April 15. We will also be unable to prepare an extension payment estimate before the April deadline. You can find a more detailed schedule of our tax deadlines for the entire year in the Client Resources section of our website.

Engagement Letter

You can download the engagement letter from our website, or, if you would prefer to complete it on your computer using an e-signature, give us a call or send us an email at general@runyancpa.com.

Tax Questionnaire

This brief questionnaire will help us gather the information necessary to accurately prepare your tax return. Be sure to complete this, along with your engagement letter, before submitting us your tax information.

Tax Organizer

The Client Resources section includes a blank organizer that allows you to summarize your 2019 tax information. We don't require you to fill it out but it lessens the likelihood of omissions from your return and reduces the amount of time needed to prepare it. For those of you who received a personalized organizer last year, Erin will be uploading it to your client portal in the coming days. If you aren't on our list and would like to receive a personalized organizer that includes your 2018 tax information, please let us know.

A Summary of Our Tax Season Process

1. Gather documents.
2. Complete your engagement letter and questionnaire.
3. Upload your documents to your online portal or drop them off at our office during open business hours.
4. We'll then prepare your return and contact you with any questions.
5. When complete, we'll contact you to schedule a time for you to review and pick up your return, pay your invoice, and discuss your return with Jim (if you've elected to have an exit meeting).
6. If you're unable to come in, you can review your return through your portal account. We will then send you the 8879 e-file authorization form through DocuSign for your signature.
7. Once you've signed the e-file authorization and paid your invoice, we will e-file your return.