

Tax Season Is Here!



Here's what you need to know



We have included your tax questionnaire with this newsletter. We'll be sending your engagement letter through Liscio, our new communication platform (more on that below). Both your questionnaire and your engagement letter are required to prepare your return. After you submit your documents, your Lead Tax Preparer will be contacting you to get additional information and to help with any questions you may have.

Our office deadline for receiving your tax data is February 16 for 1120S and 1065 returns and March 16 for 1040 and 1120 returns. If we receive your data after these dates, we will file an extension and prepare your return once the tax deadlines are over. If you would like us to file an extension, please notify us ahead of time.

We've moved!

Our new office is located upstairs in the same building as Batteries Plus on Main Street. Since we are still open by appointment only, please call or email before stopping by. Our address is 2504 W Main Street, Suite 2B.

Advance payments

As with many other businesses and industries, our costs have risen dramatically. To help with these increases, we will be collecting an advance payment before we begin preparing your return. The payment amount will be equal to 80% of your prior-year tax invoice. This will pay for the payroll and software costs of the work as it is being done rather than waiting weeks or months afterwards before we receive payment. Your advance payment will then be applied towards your final tax invoice once everything is finished.

Liscio: our new communication platform

Working with us just got a lot easier! We're excited to introduce Liscio, our new communication platform that brings communication, file sharing, and storage together in one place. Liscio is available via mobile app and web browser, allowing you to work with us wherever you are.

Going forward, we will be working with you through Liscio instead of email or our old client portal, which is no longer active. In the coming days, you will receive an invitation email from Liscio that will allow you to set up your account. Once you are set up on the platform, we will be able to send your tax engagement letter for you to sign.