

We must first announce our decision to restrict all tax appointments to be remote, virtual engagements for the 2021 tax season. As you know, the pandemic is unrelenting, and is spreading to record infections, illnesses, and deaths here in California. For your safety and ours there will be no exceptions. We regret that this decision is only just now being communicated to you. Our apologies. Also, we understand that you may seek other tax preparation services knowing that you may still want a person-to-person office meeting. Be assured that this is totally acceptable to us and will not subject you to a ban at Protax Associates. 😊 Also know that we will cooperate with any new preparer you choose. With your permission, we will forward all requested documents to you or them. If you wish to cancel a 2021 appointment with us, please let us know by email or phone call as soon as you can. Despite our decision, we anticipate clients will book us to capacity.

If you remain a client, you will have many options to submit your documentation. You will be able to use regular mail or the mail slot at the office to submit your documents prior to your appointment. You will be able to securely submit your docs online and have a “Zoom-like” virtual appointment with us! Those details will be forwarded as needed. You will also be able to use your regular email account to send docs. This is not recommended as it is not as secure as our tax communication application. Each method still REQUIRES an actual appointment with one of our preparers. Please book asap if you have not already. Many of you set an appointment during last year’s appointment. You are good. If not, go to [www.protaxassociates.com](http://www.protaxassociates.com) and click on the Book now link. There is no extra fee for choosing any of the above options.

We are excited to honor all medical frontline workers. New and existing clients in these fields will receive free tax preparation of their 2020 individual tax returns. There is no catch and no further obligation. Please get the word out to these deserving heroes. On our appointment app there is a special service option for them (or you!) to click on to schedule an appointment. They will have the lone option of booking with Steve. As an aside, this should motivate you to book your spot asap if you have not already done so. Steve will fill up, but you will have both Joe and Luis to serve you. Leah will not see any clients for this tax season. Her responsibilities at her employer have increased dramatically. Due to honoring medical frontline workers, **we regret that will not be able to provide free tax return services to active military personnel or their parents.** This tradition will be suspended for one tax season.

We are anticipating some challenges with reporting the amount of stimulus check money that you received. The 2020 tax return requires us to report that amount exactly. I fear that it will hold up your valuable refund if you do not have that number precisely as received. The amount is reported to have all others receive the stimulus via their tax returns if it was previously withheld.

We will be available by phone beginning the week of January 11<sup>th</sup> at 626-858-2340. You may book online anytime.