

On a trial basis, we have decided to allow in-person tax appointments to all clients who are fully vaccinated. Please provide proof of vaccination. For those who are not, we have very efficient remote, and virtual engagements for the 2022 tax season. Currently, 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 2022 appointment with us, please let us know by email or phone call as soon as you can. This courtesy will benefit many others who are currently on our waitlist.

If you remain a client, you will have many options to submit your documentation. You will be able to use regular mail or enter our office foyer, that is not restricted, 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 and click on the Book now link. There is no extra fee for choosing any of the above options.

We are excited to resume free tax preparation for Active Duty military members AND their parents. workers. New and existing military clients will receive free tax preparation of their 2021 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.

We are anticipating some challenges with reporting the amount of stimulus check money and the Advanced Child Tax credit that you received. The 2021 tax return requires us to report that amount exactly. Please provide all letters received from the IRS indicating the amount of credits you received. We 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 17th at 626-858-2340. You may book online anytime.