

# **ATTENTION: PLEASE READ!**

## **2021 Tax Appointment Procedures**

Due to Covid-19 we are not offering in-person appointments this tax season. We have decided to implement the following procedures in an effort to give us the best opportunity to keep our staff healthy and keep our office open to serve you this tax season.

### **For Appointments:**

1. Zoom Meeting – This is our preferred method for tax appointments this year. This gives us the opportunity to share our computer screen with you while still having a face-to-face meeting. To choose this option you will need to notify us the email address you would like us to send the Zoom invitation link. We will email the link the morning of your appointment.
2. Phone Conference - We can conduct your appointment over the phone. We will still discuss your tax return and answer in questions you have, but we will not be able to share our computer screen with you.

### **Getting Us Your Documents:**

We will need to receive your tax documents 7 days before your tax appointment, to give us time to enter the data before your appointment. For example, if you have an appointment on Monday February 8, we will need your documentation on or before Monday February 1. If your paperwork is received late, your appointment may be cancelled and rescheduled to allow time to input your data. The following are options to sending us your data:

1. Email – This is our preferred option. If you would like to email your documents, contact us ahead of time and we will email you a link to upload your documents securely.
2. Mail us your documents.
3. Fax your documents. Fax number is 507-373-7709. Please include a cover page with your name, phone number and how many pages you are faxing.
4. Drop Off – You may drop your documents off at either location. Each location has a drop box that is available during business hours.

### **Tax Return Signing Options:**

1. Electronic signing is our preferred method. Using this option, you will be able to electronically sign the paperwork via a secure link that we will provide.
2. We can mail your documents to you for signing.
3. You may sign returns in-person if you prefer that option. In Wells, you may come into the building but will sign returns in the hallway outside the office. In Albert Lea, we will bring the documents to your car for signing. In both locations, it will be first come first serve. Please allow extra time when stopping to sign.

### **Options for Receiving Tax Copies:**

Our procedures will be the same as prior years, however, please allow 2 weeks for processing of your tax return.

1. Electronic copy. This is our preferred option. We have a new procedure for this option. You will receive an email that the document has been uploaded to your portal. You will log into your portal to download the document. This option offers a \$10 discount on your year-end tax fee.
2. We can mail your documents to you. There are two options. Regular mail which has an extra \$3 charge, or we can mail certified with tracking which has a \$15 charge.
3. You may pick up your paper copy of the tax return. If you choose this option, we will bring the copy to your car. This will be done on a first come first serve basis. Please allow extra when stopping to pick up your tax copy.