



Happy New Year & Welcome Back!

We hope you and your loved ones have been staying safe during this past year. COVID has certainly shifted our lives and the ways we all conduct business and, here at Quiktax it is no different. Please continue reading to see the changes we are implementing this year due to current COVID protocols.

Every year, all of us (Rusty included) look forward to getting our office ready to welcome our more than 600 clients that come in to get their taxes done.

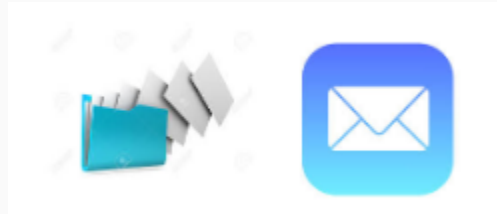
Unfortunately, COVID has changed our procedures and we **WILL NOT BE ACCEPTING IN-PERSON APPOINTMENTS THIS YEAR.**

Below are important items for your 2020 tax returns...

Remote Returns for 2020

- **Send all documents - via mail, upload to our secure online portal, or drop them through our mail slot in a sealed envelope. Please be sure you have received ALL your documents prior to submission.**
- **We stay in contact throughout the tax return preparation, then finalize with you by phone or zoom.**

**You may sign electronically, and have your return
downloaded to your computer from our secure portal
*Fast, Easy & Secure!***

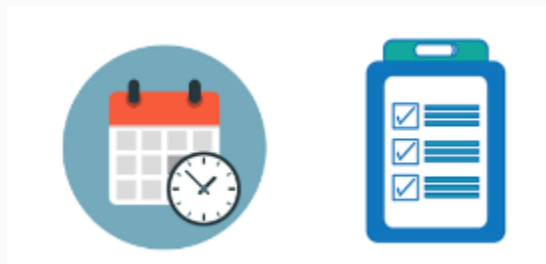


Appointments

***Due to COVID-19, we will be conducting all finalization appointments by phone and Zoom.**

After you have submitted ALL your documents and we have prepped your tax return we will call you to schedule your finalization.

- Phone: 714-744-4077
- Email: info@quiktaxservices.com
- Website: <http://www.quiktaxservices.com/contact/request-appointment>



Policies/Deadlines

- The IRS will begin accepting tax filings on **February 12, 2021**. The delay is due to recent tax law changes related to the passage of the CARES Act. Refunds may be delayed to the beginning of March.
- IRS requires you to furnish your **Driver's License** or **State ID**, both spouses' ID's are required for a joint return (Please send an enlarged copy so all numbers and dates can be seen. Send only if you renewed in the last year.)
- **Form 1095 A, B or C** is required if you had health insurance at any time in 2020.
- **Phone finalization cancellations** with less than 24 hrs notice will be charged **\$25**
- **Tax Returns are available** within the **Client Portal** for 1 year, then they are available by email request

Client Portal

Your previous year's tax return is available in your secure client folder.

Click the image below to login

If you are uploading tax documents, be sure you have received ALL your paperwork & upload everything together.

Payments

Payment is due at time of service - tax returns will not be filed until payment is received. We **accept cash, checks, Venmo (3% fee) & major credit cards (5% convenience fee)**

COVID Relief Efforts

During 2020, many of our business clients were able to take advantage of the CARES act relief funds offered from various government agencies. In total, we were able to assist our clients in securing over **\$1,000,000** of COVID relief funding. We continue to monitor these programs and anticipate supporting our clients in getting more funding throughout 2021.

Referrals

Thank you for continuing to help our business grow! Please share a positive experience with your friends and on our **Yelp** page (click image below)

Stay well and we look forward to hearing from you soon!

~Lorie & The Quiktax Team



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