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Dear Valued Client,

We hope you had a healthy and happy holiday season and we offer you our best wishes for 2021. This past year has been a very stressful and trying time for all of us, and we want to thank you for your continued support. The safety and well-being of our employees and clients remain our top priority while still providing our tax services, albeit a little different this year. We would like to share with you our new policies and procedures that follow City of Milwaukee guidelines and ordinances. We want to thank you in advance for your patience and understanding as we navigate through this tax season.

- Anyone entering the lobby will be required to wear a face mask as per local ordinance.
- Please contact us if you would like to schedule a phone appointment as we have found most questions can be answered over the phone. We understand this is different from sitting down for an appointment, however we are confident we can still prepare your taxes effectively while following local ordinances.
- We will have in lobby drop off times and scheduled curbside drop off times for tax season. Currently our **in lobby drop off hours are Monday – Thursday 8:30am-12:30pm**. Call or email ahead to schedule curbside drop off on Fridays and Saturdays. You can use our mail slot in the front door ANYTIME for contactless drop off. If you prefer to upload your documents to a secure folder through our website, please email us at: admin@tennessen.net. This secure folder is a convenient option for you to upload your documents to. If you prefer a pdf copy of your tax return we can upload your completed return for a paperless option.
- Once your return is completed you will be contacted by phone or email to go over the results of the return and any questions you may have. We will also take care of scheduling your pickup time (in lobby or curbside) and arranging payment. We also offer priority mailing for \$10.
- We have staggered our staff to limit the number of employees working in the building at the same time. All our employees can and do work remotely and are told not to come in if they are feeling ill. Please keep in mind that when you drop off or pick up, the person helping you will not be able to answer any tax questions and therefore, we ask that you call or email us with your questions. We scan all your documents and can view those as well as your return copy while you call or email us from your home.
- We are available by **phone Monday – Thursday 9am-5pm and Friday & Saturday 9am-3pm** through April 15th. After April 15th, our hours are Monday – Thursday 10am-3pm. We answer emails as soon as we can. After phone hours, email is a better way to reach us instead of leaving a voicemail.
- We will not have a “cut off” date this year. As of now, taxes are still due April 15th, 2021. We encourage you to have all documents in the office as soon as you can. If you would like us to file an extension for you and you will NOT be dropping off your paperwork before the due date, please contact our office prior to April 13th. We **do not** automatically file extensions for any personal or business client. Contact our office for partnership, corporation, trust and estate return due dates & deadlines for items to be received in our office as these types of returns have different due dates. If tax due dates change, we will post an update on our website and voicemail.

E-SIGN - We are again offering the option for e-sign (electronically reviewing your return and signing from your phone, tablet or computer). If elected, you will receive a digital copy of your tax return that allows you to review your return prior to signature. There is an additional \$10 fee for this service. Many of our clients have found this to be a very convenient time saving feature. Be sure to check the box on the enclosed packet if you are interested. Contact us if you have any questions about e-sign.

OUR FORMS - Enclosed you will find our client packet that needs to be completed and signed before the tax return preparation can start. If you received a stapled white packet, please return our engagement letter and sheet with the word Important at the top. Please do not return the forms to our office until you have your tax materials. We understand we ask a lot of questions; please know we are required to ask you these questions and are subject to fines and or penalties for not doing so. We know for many of you your taxes do not change much from year to year, however 2020 was a unique year with many tax changes and we ask that you take your time when filling out the packet. We are available to answer questions you have about our forms, please call or email. **NEW CLIENTS:** please fill out our client packet and be sure to include a copy of your 2019 tax return.

FEES - Please be advised that our fees can vary year to year due to additional time, new regulations, tax laws and higher software fees. In addition, phone appointments, calls and/or email correspondence time will be factored into the final tax prep fee which is due when your return is completed. Please keep in mind that we are available all year to answer any tax questions you might have as well as run tax projections and advise on withholding changes. If you receive any tax notices please mail or drop those off for us to review. There are additional fees for services provided once your return is complete, however, it is always recommended to address taxable events as they occur during the year and not just at tax filing time. There are underpayment penalties that can apply to returns without the correct amount of withholding throughout the year. If we provide 2021 estimated vouchers to you, please pay them or contact us if you have questions.

PROTECT YOURSELF FROM IDENTITY THIEVES - The IRS or state authority will not call and demand payment by credit card or prepaid debit card over the phone or threaten to bring in law enforcement. The taxing authorities will not initiate spontaneous contact with taxpayers by email to request personal or financial information. Safeguard your personal information by using security software on computers/phones and using unique passwords. If you receive emails or phone calls from scammers, please contact the Treasury Inspector General for Tax Administration via their website at: <https://www.treasury.gov/tigta/contact.shtml>.

REFERRAL PROGRAM- Thank you for your referrals year after year! We appreciate how many of you have referred us to your friends and family. Our only form of advertising is you, and to thank you, we will offer you a \$75 credit on your account for each new client you refer who uses our services. Be sure to have the person you are referring mention your name and they will receive a one-time discount of \$50. Some restrictions apply to dependent returns.

Please note that the enclosed forms and this letter reflect information available to us as of 01/4/2021. We are doing our best to plan for this tax season but know that at any point we may need to adjust and come up with new ideas and deal with changing tax laws. We did it last year, and we will do it again! Our business has served the area for over 52 years. When you support our small business, you are supporting our employees and their families. As an essential business we have not stopped working and continue to support our personal and business clients. Although it will look different this year, we are confident that you will be just as pleased with our service this year as in years past.

Best wishes for a healthy new year!

Tennessee Accounting & Tax Service Inc.