

December 27, 2021

Hello!

We all hope you and your families and associates are well and safe. We have great hopes for 2021 for our employees, clients and associates. It's time to get ready for the tax season and the work to be done.

We are accepting in-person appointments for tax work in 2022. We are also prepared to hold Zoom meetings and phone calls to discuss your income tax returns, filings, planning and other issues as needed. Call the office if you'd like to set up a Zoom time.

- 1) Engagement Letter – you'll find this on our web site in the downloads area. Please print, complete and sign and date the letter. Please include it with the materials you provide us.
- 2) 2021 PPP or EIDL loan and grant details – date funded, amount, etc.
- 3) Review your records of employees and contractors to correct any addresses. Remember the full legal name should be used – e.g. Joseph not Joe. If your contact information has changed, please inform us. Remember it's fine to issue a 1099 when not required.
- 4) Form 1099-NEC is still to be used for reporting payments to your contractors. The 1099-MISC is no longer for this purpose.

We would like to have all details for payroll and contractor reporting by **1/18/22**.

We would like to have information from your accounting systems by **1/31/22**.

You can upload documents QuickBooks, word, excel and other files to our client vault. Please contact our office manager Michelle Palmer michelle@ttatax.com if you have any questions about the vault. If you use online QuickBooks, please let us know if the access information has changed. You can drop off materials at our office if that is preferable. Please do not provide sensitive information via email. Please let us know when you upload to the vault as we do not get notified.

Our renewed promise to you, our clients: We will always make every effort to provide the very best and most accurate service. Your satisfaction is extremely important to us.

Sincerely,

Marion R. Thompson, CPA
Ian Valdivia

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