

Thursday, February 18, 2021

re: Organizer and engagement - use to pull documents and answer critical questions – please return in order

Welcome to the 2020 tax filing season from K& R Tax!  
Please read this email carefully as it describes our procedural change on how you submit your tax documents to us for 2020 filings.

Critical paperwork has been placed in your portal (officetoolsportal.com). **This paperwork has 4 parts, and this email gives instruction how to fill out each part.**

### **Part 1: Engagement letter**

Read this document – it outlines deadlines, procedures, and other important info. Typically, if you have a general question, it can be answered by reading this information. No signature is required on this document. By submitting documents to us to prepare your taxes you are agreeing to the terms.

### **Part 2: Checklist**

The tax checklist provides a list of items you had on your 2019 tax return. Use this as a guide to help you gather the documents that need to appear on your 2020 tax return. If something no longer applies, draw a line through the item and write “did not have in 2020”. If you have an additional document in 2020 that was not on your 2019 tax return, write this in on the checklist.

### **Part 3: Questionnaire**

The tax questionnaire is primarily 3 pages of yes/no questions. Please answer each question – do not leave any items blank.

### **Part 4: Tax Organizer**

The organizer is where you will update personal information and enter expenses that are not already on a formal tax document that you receive in the mail. Items such as medical out of pocket, medical miles, charity contributions, and department of motor vehicle. Summarize and write in these expenses. Do not send the receipts.

Additionally, if you use Schedule C or Schedule E, you will be able to write in the income and expenses you had in 2020.

## Assembly:

Gather all the tax documents you received and scan them along with the checklist, questionnaire, and the organizer in **one scan** and upload everything at

<https://www.officetoolsportal.com/portal/login>

If you do not have a scanner, you can **download a free app (Adobe Scan)** that will convert jpegs into one pdf.

<https://acrobat.adobe.com/us/en/mobile/scanner-app.html>

As a general reminder, **please do not send us documents one piece at a time**. WAIT until you have everything. Our current office saying is: “Don’t send anything until you have everything.”

Once you submit your documents, you will start to receive correspondence from us regarding your file.

We look forward to our upcoming interaction and the completion and filing of your 2020 tax return.

Sincerely,

Richard Lowry, Shareholder and Tax Accountant

K&R Tax Accounting Services, LLC