

**MARY LEMONS, EA, ABA**

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Dear Clients:

In the last several years our office has been increasingly pressured for time during tax season to adequately prepare tax returns for our clients and we have found ourselves working greatly extended hours to get everything done, all at the expense of our personal health and family life.

We have already allowed clients to drop off, mail, fax or scan and send their documents over our secure portal to save them time. This has, actual worked very well for both you the client and us.

Keeping this in mind and the Covid 19 restrictions to our profession as well as others, we are changing to a “no interview” office. We ask that you get your tax information to us utilizing either mail, drop off, fax or uploading to our portal. We will contact you when we begin reviewing your tax information and do a phone interview with you if we have concerns. This will allow us to call you with accurate amounts of refunds or balances due. If we feel the only way to accurately work your return is to meet with you face to face, we will schedule that meeting. When your return is ready for signatures, we will schedule you a time to come to the office. This will allow social distancing as required/suggested due to the pandemic.

As always, we will be here for your questions and concerns. If you experience major changes in your tax situations within the year, please bring that to our attention. This will allow us to assist you with an accurate tax return.

Enclosed, you will find our yearly newsletter. With the postal rates skyrocketing, future newsletters will be emailed to you instead of snail mail. We will be collecting email addresses this year to facilitate this change. Please contact the office with your email address or send to [lenita@itabk.com](mailto:lenita@itabk.com). This change will also allow our office to send out notices we feel are important during the year at the time the information can be best utilized by you. The newsletters and yearly check sheets will also be posted on our website. The web address is above.

Our website has a portal that allows for secure transfer of sensitive information. Personal portals are available also through our website. With a portal, we can upload an electronic copy of your tax return. Only you will have access to these documents any time you may need them for banking or other purposes without hunting up your paper copy.

It has been a very trying year for all of us. None of us like change but change we must. Let us all work together and emerge with a new and brighter world.

Sincerely,

*Mary Lemons, EA, ABA*

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