



## 2021 Tax Communication, Process & Timeline

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Tax season emails, texts and notifications are coming soon! To start, you'll receive these emails:

(1 of 4) **KICKOFF EMAIL** (*mid-January*)

Recipients: All individual and business tax clients  
Sender: [admin@bossadv.com](mailto:admin@bossadv.com)  
Subject: **BOSS Advisors 2021 Tax Season is Here!**  
Purpose: This is the Tax Season Kickoff email! You can find the same information at: <https://bossadv.com/2021-tax-season-information>.

(2 of 4) **ENGAGEMENT LETTER** (*mid-January*)

Recipients: All individual and business tax clients  
Sender: [no-reply@ignitionapp.com](mailto:no-reply@ignitionapp.com)  
Subject: **Boss Advisors has sent you a proposal**  
Purpose: This is your engagement letter, which authorizes us to do the work, and which collects payment from you. We cannot start any work until you this has been signed and returned. You'll be billed a deposit on signing, and the remainder upon completion.  
Exception: If you are a Tax Subscriber or if you have already signed an engagement letter, you won't receive this email.

(3 of 4) **INTUIT LINK PORTAL** (*mid-January*)

Recipients: All individual and business tax clients  
Sender: [do\\_not\\_reply@intuit.com](mailto:do_not_reply@intuit.com)  
Subject: **BOSS Advisors 2021 Intuit Link**  
Purpose: This is a portal where you can answer questions and securely upload tax documents. Note, if you have a business that files a separate tax return, you will receive a separate request through Intuit Link for the business tax information. You can also login to Intuit Link directly at <https://link.intuit.com>.  
Celebrate! We heard your feedback on TaxCaddy and are going back to the tried and true Intuit product!

(4 of 4) **E-FILE SIGNATURE AUTHORIZATION** (*will be sent upon completion of your return*)

Recipients: All individual and business tax clients  
Sender: [dse@docusign.net](mailto:dse@docusign.net)  
Subject: **Action needed: Please sign your tax documents**



Purpose: We are required to obtain your signature before e-filing a tax return. For a married couple, we need the signature of both spouses. For a business, we need the signature of any authorized person (e.g., an owner or manager).

### Tax Prep Timeline: Your cooperation is key!

From start to finish, you can expect a three-week timeline once we've received *all* requested information. Timely responses from you will ensure we get your return filed faster! Steps:

- Send an email to [admin@bossadv.com](mailto:admin@bossadv.com) when you've uploaded your tax documents to Intuit Link.
- Your tax preparer will reach out to you once you've confirmed that you're done uploading your tax documents.
- Your return will remain with the preparer for up to two weeks.
- Your reviewer will contact you with open items. Expect a week turnaround time for a final draft once all open items have been answered.
- We'll send a notification of final billing, which will be billed automatically through Practice Ignition using the payment information you provide when making your deposit.
- When your return is ready for filing, we'll send you an eSignature request.
- Once you've provided your eSignature, and your return has been accepted by the IRS and any states, we'll upload a PDF copy of your filed returns into Intuit Link.

### Individual Tax Process

- Start to gather important tax documents NOW! Most forms such as W-2s, 1099's and 1098's are sent by January 31st, but several are available by mid-January. Note, you may be able to login to the W-2/1099 provider's website and download your forms earlier.
- **IMPORTANT!** The IRS is issuing two new letters this year, please upload both to Intuit Link:
  - Letter 6475: Details how much you received for the third round of stimulus.
  - Letter 6419: Details how much you received for the advanced child tax credit.
- Send a confirmation email to [admin@bossadv.com](mailto:admin@bossadv.com) when you've uploaded your tax documents to Intuit Link.

### Business Tax Process

- Business entities can start *today!* Unlike individuals who have to wait for tax information, businesses generally create their own.
- Send a confirmation email to [admin@bossadv.com](mailto:admin@bossadv.com) when you've uploaded your tax documents to Intuit Link.



### Mark your calendars! Important Due Dates (based on calendar-year taxpayers)

- **1/18/22** Q4 2021 estimated tax payments due
- **1/31/22** Due date for W-2s and 1099s to be issued
- **3/15/22** Due date for S-Corporation (1120-S) and Partnership (1065) tax returns
- **4/18/22** Due date for Individual (1040) and Corporate (1120) tax returns
- **4/18/22** Q1 2022 estimated tax payments due
- **5/15/22** Due date for Nonprofit (990, 990-EZ, 990-PF, 990-T) tax returns
- **6/15/22** Q2 2022 estimated tax payments due
- **9/15/22** Extension deadline for S-Corporation (1120-S) and Partnership (1065) tax returns
- **9/15/22** Q3 2022 estimated tax payments due
- **10/17/22** Extension deadline for Individual (1040) and Corporate (1120) tax returns
- **11/15/22** Extension deadline for Nonprofit (990, 990-EZ, 990-PF, 990-T) tax returns
- **1/16/23** Q4 2022 estimated tax payments due

### Extensions

If you routinely extend your tax return, please let us know! Our contact information is below.

### Meet your Team!

Lastly, our team has grown and we'd like to reintroduce you to the BOSS Tax Team!

1. Tax Managers: [Julie Green](#) and [Jason Tomkivits](#)
  2. Staff Accountants: [Daniel Baldwin](#) & New Team Member (to be announced soon!)
  3. Admin & Partner Support: [Abby](#) & [Chad](#)
- Questions?
    - Call or text us at 602-699-4829 (please include your name in any text messages)
    - Email us: [admin@bossadv.com](mailto:admin@bossadv.com)

We look forward to working with you this tax season!