

NEW YEAR 2021 UPDATE

# TIME TO TALLY UP

Tax Season Update from Accounting Plus!



Time to Tally Up represents our year-in-review- summing up everything you need to know as we enter the new year.

## *Recap 2020 Reset 2021*

This past year was like no other—an extended tax deadline, tidal waves of PPP rules, forgiveness calculations, and working to simply maintain some sense of normalcy.

Because it's been a tough year, our team wants to help you prepare early as we face the beginning of a new tax season.

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[accountingplusinc.com](http://accountingplusinc.com)

## FIRM SHOUTOUTS

# INTRODUCING: Insurance+Plus

Your Accounting Plus team, with over 28 years of guiding business and individual clients through their accounting and tax journey, saw the need for insurance services for their clients--a "one-stop-shop" of sorts! So after several years of hard work and the hiring of a qualified insurance team, we're proud to offer quality, affordable commercial and personal lines insurance!



### OFFERING:

- PAY-AS-YOU GO WORK COMP
- GENERAL LIABILITY • BOP
  - COMMERCIAL AUTO
  - GROUP HEALTH
- HOMEOWNERS • AUTO • LIFE AND MORE!

Learn More:

[insuranceplusllc.com](http://insuranceplusllc.com)

## TAX SEASON UPDATES

### APPOINTMENTS & PRICE INCREASE

In anticipation of COVID-related limitations on businesses with regards to customer capacity, this coming tax season we're going digital! We will not be accepting in-person appointments, instead we'll ask you to simply **upload, drop off, or mail in** your tax documents!

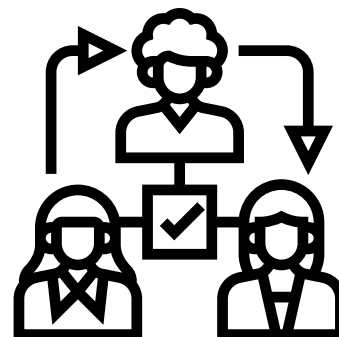


To prepare for an all digital tax season, we've increased staffing, upgraded software and systems, and revamped our website to accommodate this change in process and to ensure a quicker turn-around time for your tax return. With these improvements comes an increase to our tax preparation fees of 30%. While we realize this is a major increase, we feel our prices remain in line with our competition and are still far less than the national chains. We continue to offer high quality tax preparation services with a team of trained and educated staff to give you confidence that you're getting the best results and tax advice.

# TAX PREPARATION PROCESS

## IDEAL TAX PREP WORKFLOW

1. CLIENT WAITS FOR ALL TAX DOCS
2. CLIENT UPLOADS DOCS TO A+ PORTAL
3. A+ TEAM PROCESSES TAXES
4. A+ TEAM CONTACTS CLIENT TO DISCUSS RESULTS & FINALIZE TAXES
5. CLIENT E-SIGNS & PAYS TAX PREP ONLINE
6. A+ TEAM E-FILES TAXES



### NEW! Accounting Plus Tax Portal

Why use a portal instead of email? Your tax data will be secure; there are no file size limitations; portals keep everything organized in one place; and, portals give you access to digital copies of your tax returns and source documents year-round! Through your new AP Tax Portal you can even e-sign tax returns and submit payment for prep fees!

Check your e-mail in mid-January for an invitation to the Accounting Plus Tax Portal and a copy of your personalized 2020 Income Tax Organizer!

Click to see: [Tax Portal Basics Video](#)



### DON'T FORGET FORMS:

- NOTICE 1444: REGARDING YOUR EIP STIMULUS REBATE
- FORM 1099-G: IF YOU RECEIVED UNEMPLOYMENT
- FORM 1095-A: IF YOU HAVE MARKETPLACE INSURANCE

If you have questions about Cares Act or 2020 Economic Impact Payments, visit [IRS.gov](https://www.irs.gov) for more information.  
For 2020 tax updates and tips visit our web site!

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## 2021 TAX SEASON HOURS

JANUARY 22 - APRIL 15, 2021

DROP-OFF OFFICE HOURS:

Monday - Thursday 9a - 7p

Friday 9a - 6p Saturday 9a - 1p

Don't have a scanner to  
upload docs?

**USE YOUR PHONE!**

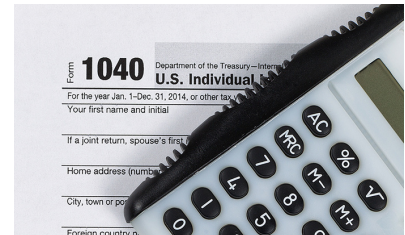
Check your App store  
for Free Scan Apps



## OTHER UPDATES

**NEW! Call Routing:** When you call us during tax season, you'll hear a new menu and a familiar jingle! We've set up call routing to help shorten phone hold times and connect you quickly to the team you're calling for. (573)445-3805

**NEW! Website Update:** Our website has a new look and feel. We've simplified and enhanced it to make finding answers easier, and to guide you along. You'll find updated content refreshed monthly that offers more resources for you and your business, including an online payment button, quick access to portals, and other shared software, and coming soon detailed instructions on how to upload data to our team.



Checkout our website  
for year-end tax  
planning tips!



Visit us 24/7: [accountingplusinc.com](https://www.accountingplusinc.com)

### FROM ALL OF US:

We appreciate your continued business and hope to make this tax season as smooth as possible! We'll miss seeing you in person but, if you have any questions, please reach out to us by phone or email.

We wish you health and prosperity in 2021!

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