2020 Individual Tax Season Instructions

NEW INTERACTIVE FORMAT!

This year we have a *new interactive format for the engagement letter and questionnaire!* We ask that you please try using our new user-friendly format and if you need to have a printed version to write in manually, please ask our staff and we can provide that to you.

DEADLINE FOR DELIVERING SUPPORTING DOCUMENTS

The **DEADLINE** for delivering supporting documents to Shaw & Associates for Individual tax returns is **3/5/2020** and we will closely adhere to this deadline.

If this deadline is not met, we will need to extend your tax return. **If you know at this time that you plan to extend your income tax return, please let us know IMMEDIATELY so that we can prepare the extension and plan our work flow.**

If you have all of your documents and are waiting for only 1 or 2 items, please complete the questionnaire and submit the rest of your documents to us at this time! We do not want to wait to start on a return that is missing only one item.

The E-FILING DEADLINE IS 4/15/2021

Please note that we are required to submit tax returns to the IRS via e-file and we CANNOT e-file your tax return without your signature on the E-file Authorization Form that we email to you. If you must file a paper return to the IRS, additional documentation and additional costs are required.

If you need to MANUALLY SIGN YOUR TAX RETURN, please schedule a time with our Office Manager, Jessica by calling 970-223-0792 or emailing jessica@kevinshawcpa.com

SUBMITTING SUPPORTING DOCUMENTS

You can submit any supporting documents through our secure portal SafeSend, faxing to 970-223-6509, or mailing or delivering to our office at 1044 West Drake Road, Suite 201 Fort Collins, CO 80526.

****IF DROPPING OFF DOCUMENTS, please use our drop box outside our office doors.****

Keep in mind that if you have uploaded your digital documents to us we do not need hard copies as well.

TIPS FOR SUCCESS IN COMPLETING YOUR QUESTIONNAIRE AND SUBMITTING DOCUMENTS

- Have all your tax documents in front of you when you complete the questionnaire. Although our new interactive questionnaire format is designed to be able to pause and resume completion at a later time, we believe that completing it in full at the time you are ready to submit your documents, the more accurate, complete, and easy the process will be.
- If details requested on the questionnaire are included in a document that you will submit to us, DO NOT also detail these amounts on the questionnaire.
- If we prepared a separate business tax return for you, DO NOT provide any details on the individual questionnaire or with your individual documents related to that business. **The only business details that you should provide on the individual level are for a sole proprietor or sole-member LLC business that is filed as a schedule on your personal return.**
- **INSTRUCTIONS FOR INTERACTIVE QUESTIONNAIRE:**
  - Begin by clicking the link in the email OR you can find the link on our website under Tax Questionnaires
  - Make sure to answer each question in order on the questionnaire, without skipping ahead. This is interactive, so a "no" answer to a particular question likely will make the next question disappear. If you skipped ahead, you likely will be trying to answer a question that may not even be applicable to your situation.
  - You may hit save at any time. You will receive an email with a link to continue completing your form.
  - Once you have completed the questionnaire accurately, you can hit the submit button that will be at the end of the questionnaire. You'll receive a copy of the completed form as will our team, **so please do not send us your copy.**
- Submit your documents together as much as possible and not one at a time. This will help prevent accidentally sending the same document twice that your tax preparer has to then spend time reviewing to ensure it is a duplicate, and will ultimately save you money.
- Please always submit digital documents through our secure portal, SafeSend and not by email. You can select either Jessica or SJ.
- If submitting business documents and individual documents, please submit them separately. This will improve accuracy and save time and preparation costs.

- We confirm receipt for all SafeSend uploads but it is best practice to follow up with us at jessica@kevinshawcpa.com after submitting to the SafeSend to ensure your documents were uploaded.
- Tell us when you believe you have submitted all your documents so we can mark you as READY in our queue or if you have 1 more document coming our way.
- If dropping off documents, please be prepared to leave them with us to scan. If you need them back quicker than at the end of the preparation process, let us know and we will contact you when they are ready for pick up.
- In general, please do not submit receipts or bills to us. Make a summary (accounting software, Excel, handwritten) from your receipts, and the tax preparer will let you know if we need any details. When you give us all the supporting documents, your tax preparer needs to take the time to go through each document to make sure we're not missing anything, which adds unneeded preparation time to your cost.

Shaw & Associates will prepare your return and contact you with any questions. **We typically have a 4 week turn around unless you specifically have been told otherwise. We work in the order in which clients have submitted documents to us.**