



January 2021

Dear Valued Client,

Happy New Year and Welcome to Tax Season 2020!

After a truly unprecedented and unforgettable year, the 2020 tax season is here, and we look forward to working with you throughout the tax preparation process.

The big tax related news from 2020 was the passage of the CARES in March of 2020. Please provide us with the details of any CARES Act Economic Impact Payments (i.e., “stimulus payments”) you may have received. In addition, if you own a business that received a PPP loan, an SBA disaster loan, or some other relief grant, please include that information with your tax documents.

To begin the tax return process, please visit our Client Resource web page at <https://jlwennescpas.com/faqs/> There you will find a series of tools designed to help you work with us throughout the tax preparation process, including the following:

Tax Season Best Practices: Our Tax Season Best Practices document outlines some guidelines that will allow us to best serve you.

Engagement Letter: To electronically sign your engagement letter for tax preparation services, visit the Client Resources page and select the appropriate engagement letter.

Uploading Tax Documents Electronically: Once again, our secure portal makes it easy to transmit PDF copies of your tax documents to our firm. To upload documents, use the following link <https://jlwennescpas.com/secure-client-portal/>

Tax Organizers: Tax organizers will be available upon request. To request an organizer, contact our office. If you would like a generic organizer, please access it under the Client Resources tab of our website.

We want to express our gratitude for your business and support. We value you as a client and look forward to continuing to serve you in years to come.

Sincerely,

JL Wennes CPAs