



SCHANDEL & ASSOCIATES_{PC}
CERTIFIED PUBLIC ACCOUNTANTS

4600 Military Trail, Ste 215
Jupiter, FL 33458

Ph: (561) 624-2118
Fax: (561) 624-0726
www.schanelcpa.com

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. Also, 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 www.schanelcpa.com/client-resources. 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.

Online Tax Questionnaire: Our annual tax questionnaire is a critical part of the tax preparation process. You can complete a tax questionnaire online from your computer, tablet, or smart phone by visiting the Client Resources page.

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, you will be able to easily and securely transmit PDF copies of your tax documents to our firm using Citrix ShareFile. To upload your documents using ShareFile, visit the Client Resources page and select “Tax Document Upload”.

Tax Organizers: Tax organizers will be available upon request. To request an organizer, fill out the Request Tax Organizer form on the Client Resource page.

SafeSend Returns: Completed returns will be delivered via SafeSend Returns, a tax return delivery system that will allow you to receive your completed tax return, e-sign your e-file authorization form, and pay your invoice through a secure, step-by-step web-based interface.

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 for years to come.

Sincerely,

Schanel & Associates, PA, CPAs