

A.L. SMITH, II, P.C.

Certified Public Accountants
843 N State Road 135, Suite A
Greenwood, IN 46142

Telephone (317) 889-3050 Facsimile (317) 889-3055

www.alsmithpc.com

GENERAL TAX SEASON NOTES

January 2, 2020

Dear Clients:

As tax time is nearing – yet again – we thought it was a good time to discuss several changes and/or upgrades with our processing. As is always the case, we continually strive to enhance the tax season experience *for you AND for us*. To that end, we are constantly looking at ways to streamline the process. Please see the “**Tax Preparation Process**” document also listed on the website for more specific processing information.

For those clients who choose to come into the office to meet with us the process is, of course, simpler. We are finding more and more clients want to process their returns through an online experience as opposed to meeting face to face. We stand ready to serve you in whichever way best suits your needs.

We serve clients still in their teen years to clients over 100 years old; therefore, we must provide services to people ranging from the most technological sophisticated to those who have never and will never own a computer. Accordingly, we have in place a variety of ways to approach the tax return process. Please review the **TAX PREPARATION PROCESS** letter for processing based on the method you prefer. Also, you will find significant developments for the 2019 (and 2020 and beyond) in the link featuring the newly signed **SECURE ACT**.

IMPORTANT NOTE – NEW PAYMENT POLICY:

Unless you are a business client with which we bill on a regular basis, all fees will HAVE to be paid before your returns will be eFiled. We regret to have to institute this policy, but it has become necessary to ensure we are paid promptly for our services. We trust you understand.

You may pay your bill by a.) calling the office and providing your credit card information, b.) logging on to our website and using the PayPal account (as Guest), c.) dropping off a check or cash or, d.) sending a check.

We wish you all a very Happy New Year!!!

A.L. Smith, CPA, CFP, PFS, AIF
A.L. Smith, P.C.