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Dear Clients,

Wow!!! What a year in 2020, huh? As we start our journey in 2021, I wonder if life as we knew it will ever return. A global pandemic that saw many people lose jobs, closed businesses, and loved ones lost, has changed the environment completely. My hope is that 2021 will be a much better year.

Tax season, as of now, is still April 15th, unless the IRS tells us otherwise. We will keep you updated if there are changes in the deadline. Speaking of deadlines, **we will require 100% complete packages by Saturday, March 20, 2021**. Any delivery of information after March 20, 2021 will be subject to an extension. Of course, as always, we understand that brokerage statements and K-1s may delay you. Simply let us know if you are waiting on a form; so that, we can notate the file.

We would like to alert you of some other changes that we have implemented due to COVID-19 in hopes to keep you and us from transmittal:

- Meetings will only be via Zoom (remote video conference over the internet), or by phone call. At this time, there will be no in-person meetings.

You can personally schedule meetings with Madison by going to www.madisonrandolph.com and click on "SCHEDULE NOW" at the top of the screen.

- Drop offs are acceptable. There will be an inside, and a secured outside, drop box at the West Knoxville office. At the front desk in the West Knoxville office, we are still practicing social distancing protocols – staying at least 6 feet apart, having minimal contact, and face masks will be required to enter our offices.

For our Sevier County clients, a drop box in Sevierville will be provided in the front/reception area of the office, located on the right-hand desk. Delivery methods will be determined on a case-by-case basis.

- You may mail your 2020 tax documents to our Post Office address: Madison Randolph, P.O Box 32877, Knoxville, TN 37930. However, if you wish/need to send your tax documents via FedEx or UPS, please mail to the address listed above.

You may also upload your tax documents to the secure portal located at www.madisonrandolph.com. Click on "Login." Instructions are available on the website.

- If you have a "quick question," a form will be given to you to fill out when you come in, or the receptionist will fill it out for you if you call. We will answer those via email, and in the order received. If the answer can wait until after April 15th, please mark the form appropriately.

Please return/include the enclosed forms with your 2020 tax documents:

- 1.) **2020 Checklist:** Supporting tax documents as outlined on your personal checklist.
- 2.) **2020 Tax Organizer (Personal & Dependent Information):** Please review all the sections of the tax organizer highlighted in the gray fields (i.e. Personal Information, Dependent Information, etc.). Double check to make sure that everything in that section is accurate. If changes need to be made, simple cross-out the incorrect information and print in the correct information.

For example:

- Have you had a change of address? Please update under “Personal Information.”
- Have a change of e-mail address? Please update under “Personal Information.”
- Have you had a change in dependents? Please update under “Dependent Information.”

As a reminder: If Dependents file a tax return, and have claim themselves, your e-file return will be rejected by the IRS, and you will not receive the \$500 tax credit.

- Please pay particular attention to the “Yes” and “No” questions located under the “COVID-19 Implications.”
- Did you make any estimated tax payments (Vouchers we provided you)? Please fill in this information under “Estimates.”
- Did you have a change Banks? Please update under “Account Information for Deposits or Withdrawals.”

Correct information will ensure that we can accurately and timely prepare your tax return. Not completing this organizer will delay the preparation of your return.

- 3.) **2020 Individual Engagement Letter – Attestation/Signature Page:**

Your signature is required before your tax return can be prepared. Only the dates have been changed from the Engagement Letter you signed for the 2019 tax year. The entire 2020 Engagement Letter can be viewed at www.madisonradolph.com

- 4.) **Other applicable forms** specific to your income tax return (i.e. Schedule C’s, etc.)

Fee increases this year will be minimal unless more work is necessary to gather information and summarize. As in previous years, we accept Visa, Mastercard, personal checks and cash. All invoices are due upon receipt.

I know this is a big change due to Covid-19, but we feel it is necessary for your protection as much as it is ours. If you have any questions, please let us know.

We sincerely appreciate your patronage and as always, we strive to provide you with professional and efficient service. A satisfied client is our most valuable asset. Your recommendation to an associate, friend or family member is more significant than any advertisement.

We look forward to seeing you, and here’s to hope and good health in the New Year,

Madison

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