



Crystal Clear Tax Solutions Inc

"Helping you put the pieces together"

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HERE'S OUR ANNUAL NEWSLETTER!

PLEASE READ THIS CAREFULLY

Here is the package we send out to our clients every year in the first part of January. It starts the ball rolling for tax season. We had a season unlike any other last year, and we expect to see some similar changes this year. Please take a moment and review the information in this newsletter to understand what we are doing to move forward with business amidst COVID-19, along with changes and items that may be of interest to you. First, I'd like to take this opportunity to share my heartfelt concern for our clients who are impacted by this pandemic. We know many of you have lost wages, suffered through trying times, endured illness and may have even lost lives of loved ones. Please know that we pray for you, your families, and our nation for healing and recovery in every aspect. With this in mind I have decided to discount our pricing this year for 2020 tax prep fees, with the hope to help ease this financial burden, even if only a little. Please accept this as a token of our appreciation for your continued business, and a show of our commitment to you!

- Crystal Leibham, President

COVID-19

We are taking precautions to limit the potential exposure of our clients and our staff to the Coronavirus, as well as the flu and other bugs that roam around this time of year. Service options have been put in place to offer you tax prep that fits your comfort level, as well as help us meet mandates placed on us by the Governor. Please see below for **service options**, but ****note that they may change or be limited if the government requires us to do so in the future. Here is a list of procedures we are following:**

Allowing only one client/family in each office space at a time, and closing the tax office doors while occupied by a client., and asking clients to wear a mask the entire visit with us.

Asking our clients to socially distance if waiting outside our door for an appointment, etc.

Sanitizing our door knob (inside and out) and mail slot every 30 mins during business hours and at the beginning and end of each day.

Sanitizing pens, signature pads, and other surfaces touched by clients immediately after their time in the office.

Frequent hand washing and use of hand sanitizer by all staff throughout their shift.

Require all staff wear a mask when clients are present in our office.

Offering remote services to our clients (see next page for details).

Service Options

Part of our efforts against COVID-19 include alternative methods of tax preparation. Traditionally we see you in our office. You either come in and have your taxes prepared during an appointment with your tax pro, or you drop off your docs and fill out forms while you're here. We hope to still see many of our clients this way, however, we have other options for those who need or want them.

Online Services

Use your client portal to find and sign your consent docs, fill out the annual questionnaire, and upload your tax documents. Many of you have already been using this service for the last couple of years. You will find this a simple and effective way to get your taxes prepared without the need to visit our office. If you choose this method, you can contact the receptionist and get detailed instructions on how to get started. Once your return is near completion, you will be scheduled for a phone appointment to review your taxes and make sure your questions are answered. Your tax pro will give you all the details, and make sure you get assistance with e-signing and payment options.

Mail-In Services

Much like our online services, using the Mail-In option allows you to have your taxes prepared without the need to visit us in person. Start this process by calling our office. Tell the receptionist that you'd like to use the Mail-In tax prep option this year. They will go over the details and steps needed to do so. Once your return is near completion, you will be scheduled for a phone appointment to review your taxes and make sure your questions are answered. You will be given instructions for signature and payment. A fee of \$7.75 will be added to your tax prep to cover the cost to ship your completed tax return to your mailing address.

Drop Off Services

Get started by contacting the office and stating you'd like to drop off your taxes. Our receptionist will give you the steps and instructions needed to do so. You don't need an appointment to drop off your documents and get your return in line for processing. After calling, come to the office. If we can have you inside, we will... **otherwise, you will find instructions in the window for drop off, and our receptionist will be able to answer questions over the phone (you might be able to hear them through the window too). After your return is prepared, you will have the option to meet one-on-one with your tax pro to review your return, plan for the next year, and make any adjustments needed. This meeting may be limited to a phone appointment.**

Important to Remember

Please remember that we prepare your tax returns in the order we receive them so, if you already have most of your tax information gathered together go ahead and bring it in! There is no need to wait for those final documents to arrive. This will get your return in line, and we can start working on it much sooner. It's easier for us to add a 1099-B from your brokerage account in late March than it is to start from scratch, so go ahead and get those docs in to us as soon as possible! With the extreme possibility of an extended tax season and COVID-19 restrictions, please understand our processing times will likely be longer than normal.

Identity Theft Protection PIN's

If you have experienced tax related identity theft in the past you will usually be assigned an IP PIN from the IRS. The IRS is sending IP PIN letters now, dated January 1, 2021. If you get one of these notices, be sure to include it with the tax documents you bring to us. If the IRS assigns you an IP PIN and we don't have the letter, your tax returns cannot be e-filed. If you think you should have an IP PIN and haven't received a letter, contact the IRS at 1-800-829-1040.

Economic Impact Payments

During 2020 the IRS issued economic impact payments to around 160,000,000 individuals! If you did not receive a payment or didn't get the full amount, don't worry, all is not lost. When you file your 2020 taxes you may be eligible for the Recovery Rebate Credit. Bring the letter (Notice 1444) Your Economic Impact Payment—with your 2020 tax records. This will help us determine if you are eligible for any additional amount.

Business Auto Deductions

We provide a worksheet for giving us the information needed to legitimately deduct auto expenses (business mileage). Most of you have been complying rather well. It is imperative that you fill this worksheet out...one for each vehicle used for business. **EVERY LINE NEEDS TO BE FILLED OUT**, unless it is clearly not applicable. We will **NOT** be able to prepare or sign your tax return if they are not filled out **AND** you do not have adequate documentation. It's that serious now. The IRS and Oregon are convinced that the majority of taxpayers are claiming business auto mileage without adequate documentation. And their audits are proving them right! That means that millions of dollars of deductions will be disallowed. Ouch!

Remember, credit card statements do not count as adequate documentation. You need to give us beginning and ending odometer readings for the year (often times you can get these from repair bills, etc.). You also need to keep a log indicating the date, purpose of trip, location, & # of miles. I predict we will see a **LOT** of business auto deductions disallowed in the upcoming years....my only desire is that it **NOT** happen to any of **MY** clients!

In Closing

I sincerely hope that, as a part of this family, you feel **WELL TAKEN CARE OF**. We aren't perfect, and we make mistakes....but we sure work hard to take care of you. And we sure feel terrible if we ever let you down. We will always help you put the pieces together, one form at a time!

So, here's **OUR** new year's resolution....

We want to be reliable, communicative, and a valuable resource for you.

Here's wishing you a healthy and prosperous 2021! We can't change the times we live in. We have no control over that. However, we **DO** have control over how we **REACT** to it. So, let's keep positive, help friends and family any way we can, and really be generous with others this year. It'll make for happy hearts...and that's a good thing.

See you soon, ***Crystal Leibham and staff***