



## If your goal is to file your fiduciary tax return prior to April 15, 2020, please read the following:

Happy New Year and Happy New Decade!

Once again it's the start of tax season. We want to provide some additional background and information to you to help make it go as smoothly as possible.

As in prior years, if we receive substantially all your information for your fiduciary return after March 15<sup>th</sup> we will extend your tax return.

New for the 2019 tax preparation year: we cannot guarantee we will be able to complete your return prior to the deadline even if **full** data is received prior to March 15<sup>th</sup>.

The complexity of the tax laws continue to push the availability of tax documents to later in the year. In addition, the continued shrinking supply of tax professionals in absolute numbers and in particular those willing to work 70-90 hours a week during busy season has required us to remove the guarantee. Unfortunately, this has been a trend in our profession for a number of years and has now reached a new level. **We will prepare returns in the order we receive full information.** Our top goal is to provide the highest level of expertise and client service possible. In order to meet expectations, we want to make you aware of the situation in our profession and our firm, so we can continue to meet expectations and provide a quality experience.

If your goal is to avoid filing an extension, we strongly recommend:

- 1) Providing us with substantially all your information before the end of February. The earlier the better.
- 2) Be very responsive to all emails, calls or other communications. The quicker we can get full information from you the better the chance we will be able to complete your return prior to April 15, 2020. Failure to timely respond will push your return down in our queue.
- 3) Reply to **ALL** on all email communications. This increases the speed of communication to the entire team working on your return.

**Emergency Returns** – We understand from time to time a return must be completed in a short time period to meet third party requirements such as real estate purchases or refinancing, or your vacation schedule. We will do what is necessary and reasonable to meet these deadlines based on a mutual reasonableness of expectations. We will charge a minimum additional fee paid of the greater of \$300 or 20% of your upfront price to expedite the return.

Thank you, and we look forward to a successful filing season with you.

We acknowledge this is a change from prior years due to factors outside our control. We will continue to do our best with your cooperation to ensure we have a successful filing season together. We appreciate your understanding and look forward to working together.