Tax & Financial Solutions

Our Name, Our Goal

151 SE 223RD Ave.
Gresham OR 97030-8478
(503) 666-7909
FAX (503) 666-2235
OBTP#13862

Greetings Taxpayer,

January 2022

We here at Tax and Financial Solutions are busy getting geared up for 2022. To make sure you are ready we have some essential information for you to review.

Important Dates to Remember:

Our Food Drive runs through April 30th, please donate!

Monday January 24th – the IRS begins processing tax returns
Friday, April 1st – We must receive all your information by this date to complete your 2021 individual tax return by the filing deadline
Monday, April 18th – The tax filing deadline
Tuesday, April 19th – Our office will be closed for the day
Saturday, May 14th – Our 5th Annual Shred Event from 9:00am until 1:00pm

Watch for IRS letters about advance Child Tax Credit payments and the third Economic Impact Payment

In January 2022, the IRS will send Letter 6419 to taxpayers to provide the total amount of advance Child Tax Credit payments that were paid during 2021. Please keep this letter regarding your advance Child Tax Credit payments with your tax records. We will need to refer to this letter when we file your 2021 tax return.

The IRS will also begin issuing Letter 6475, Your Third Economic Impact Payment, to taxpayers who received a third payment in 2021 in late January. People can also use their IRS online account to view their Economic Impact Payment amounts.

Both letters include essential information that can help us to file an accurate 2021 tax return for you. If the return includes errors or is incomplete, it may require further review while the IRS corrects the error, which may slow the tax refund.

Like last year, we encourage you to review the appointment options on the back of this letter. Please choose the option that is best for you.

Our Tax Season office hours - Monday through Thursday we open at 9:00am and our last appointment starts at 7:00pm, Fridays and Saturdays we are open from 9:00am until 5:00pm. Please call us early at 503-666-7909 to schedule your tax preparation appointment.

We sincerely thank you for your business and look forward to serving you in 2022. **Our business is growing thanks to you and your referrals.** Be sure your friends let us know you sent them. We will mail out restaurant gift cards when two of your friends, family members or co-workers come in and use our services.

Thanks,

Tony, Kristi, Rick, and our staff

We take seriously the security of your personal information. If you are not meeting with us for an in-person tax appointment or if you are sending us additional documents after your appointment, please upload your documents to Client Center. If you do not have access, call our office, and speak to the front desk staff. They can get the process started and assist you with any questions.

Review your tax return before signing the e-file signature documents: When you sign your e-file signature documents you are signing that your tax return is complete and accurate. After reviewing your tax return, if questions arise, do not hesitate to ask for clarification.

Before your tax returns can be e-filed, we must: Receive your signed electronic filing signature documents and receive payment in full for your tax preparation fees.

There are **four options** for working with us to complete your 2021 tax returns in 2022:

1) In-person appointment following all the ***CDC recommended Covid-19 protocols***
2) Drop-off your tax documents
3) Mail-in your tax documents
4) Upload your tax documents to the Client Center

All options include the following steps:

1) An interview whether in person, on the phone or via Zoom
2) Preparation of your tax returns using the documents that you provided
3) Follow-up questions on the phone, via email or Zoom
4) Review of your tax returns by another licensed tax professional
5) Assembly of your tax returns and preparation for your signatures prior to e-filing

The **in-person appointments** will be remarkably similar to what you have experienced in the past. We have updated our procedures to comply with the CDC Covid-19 protocols. All high touch surfaces are cleaned between client appointments. When you enter our building, you will need to be wearing a face covering. Your tax professional will escort you to their office. Once in the office you will have the option of removing your face covering as we will be sitting on opposite sides of a Plexiglas barrier.

If you choose to **drop-off your tax documents,** we ask that you have all your documents in a large envelope with your name on it. You will need to hand your envelope to one of our employees. They will ask you to review your client profile and read and sign our engagement letter. At the end of the day, we will match up your envelope with your tax file. Your tax return project will then be put on your tax preparer's schedule. Once your preparer has had a chance to review your documents, they will contact you with any follow-up questions and review the results with you.

If you choose to **mail in your tax documents,** we will call you when they are received. Your tax return project will then be put on your tax preparer's schedule. Once your preparer has had a chance to review your documents, they will contact you with any follow-up questions and review the results with you.

If you choose to **upload your tax documents** to the Client Center, we receive an email notification that it is there. Your tax return project will then be given to your tax preparer. Once your preparer has had a chance to review your documents, they will contact you with any follow-up questions and review the results with you. After your tax returns have been reviewed and then assembled, they will be uploaded to the Client Center ready for your signatures, you should receive an automatic notification that something has been added.