Sickler, Torchia
Allen & Churchill, CPA's, PC
Your Partner When It Counts

Optional methods of interacting with your tax professional

While this past year has brought much uncertainty, what we do know, is that 2020 tax season is here.

With this in mind, we have been working diligently on a plan which allows us to provide the highest quality service while ensuring that you and all of the people involved in preparing your taxes remain safe and healthy.

As a result, we have made a decision to have extremely limited in person appointments. Appointments in the office will be limited to very specific situations. Clients will have multiple ways to interact with their tax preparer this year. We ask that everyone keep in mind the safety of everyone when selecting the option that works best for them.

Optional methods of interacting with your tax professional:

1. **Mail:** You can mail in your information, along with your completed organizer, and a list of any questions you may have . If at all possible, we ask that you keep copies of all info sent to us for your records and to refer to should we need to call with questions.
2. **Portal:** If you don't already have one, you can sign up for a secure portal, which allows you to upload your tax documents and client organizer in a secure manner. The best format for uploading is a **PDF file**.
3. **Drop OFF:** You will be able to drop off your information during or after normal working hours at one of our office locations safely and securely. Just walk in, drop your information in one of the envelopes provided or your own, and place it in the drop box, a staff member will immediately retrieve the information. After hours there is a secure slot in the front door that you may put your information through.
4. **Virtual meeting:** You can schedule a virtual meeting with your tax professional. Most meetings will be done using Microsoft Teams. This does not require you to purchase any software, you simply click on the link and use the web application. Our administrative staff will be happy to assist and will send you a meeting invite with a link. To make these meetings more efficient, it would be helpful for our office to have all of your tax and any other required documentation in advance of your virtual meeting.
5. **In Person Meeting**: Due to the risks that can result from in person meetings, in-office meetings will be extremely limited.

    a. Meeting will be limited to not more than 45 minutes, unless longer time frames are arranged in advance.

b. Each Tax preparer will have limited days and times available to minimize the number of people in the office at one time.
c. Cleaning will be required between each appointment
d. Contact tracing information will be collected prior to the start of the meeting (ie Temperature, date and time in our office and health questionnaire.
e. You will need to exit the building upon the completion of your meeting

We look forward to working with you on your tax preparation this year regardless of the option you choose.

Please feel free to contact us with any questions at (518) 828-4616.
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