

## Welcome!

As we embark on the 2020/2021 tax season, we wanted to make sure that everyone knows this seasons Covid tax preparation protocol.

We will be using a low touch, low exposure system, which we hope will help keep everyone **safe and healthy**.

By using the Drop off system we created last year, there will be no need to contact us for an appointment to have your taxes done by us this year.

Simply let this information and forms guide you. Read through it, fill-out all the forms and gather your documentation. Please use a sealed envelope to get everything to us. We have provided them outside our door if you need one. **Please, do not forget to include the checklist! In addition if you are new to us this year we will also need a copy of your driver's license and your last 2 years of tax returns.**

We do not recommend mailing your originals through the US Postal Service for it has been very unreliable.

You may drop your envelope off at any time. Just place it in one of the drop boxes we have installed outside the office doors. We check the boxes many times a day.

Alternatively, you can send them via FedEx or UPS.

Once we receive it back in our office, we will get you in the next available a time slot.

Upon opening your envelope it will be ticketed, triggering the following steps of our tax prep process:

1. Received/Ticket Started
2. Prepped for Tax Preparer
3. Imputed
4. Need More/Question Outreach
5. Scanning
6. Processing for Delivery
7. Delivery Pending/Notification
8. Delivered to Client
9. Waiting Signatures and Payment
10. E-filed
11. Confirmed
12. Closed

If you have a referral for us or if you do not plan to have us prepare your taxes this year, please send an email to notify us: [Taxsupport@legacytaxadvisory.com](mailto:Taxsupport@legacytaxadvisory.com) **Also note that the tax practice has a new direct Phone number: 410-828-8870.**

As of now we do not know if there will be any federal or state due date changes, so we will proceed as though there are none.

Time is of the essence.

As soon as you get **all** of the documentation gathered, please get it to us as soon as possible.

We appreciate your business and cannot wait to see your actual faces again. In the meantime, just know we are working hard to get things done.

Can't wait to see you on the flipside!

**1623 York Road Lutherville MD 21093 (410) 828-8870**