

CRESSEY RICE TAX SERVICE NEWSLETTER

2019 TAX SEASON

January 2020

**E-filing opens Monday,
January 27th, 2020!!**



SCAMS are on the rise! **PHONE CALLS** from the IRS/Social Security Office are always a **SCAM**, and now even **LETTERS** can be fraudulent.

Consult us **ASAP** with any IRS/State correspondence so we can help

Hello and Happy 2020!

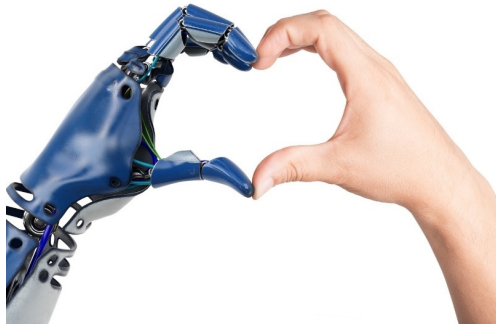
I want to thank and congratulate all of us on making it through the big tax law changes of 2018, and all the exceptional outreach you've done to plan ahead for this 2019 tax filing season. In light of what we've learned in the last two tax seasons, we are making changes to enhance your tax preparation experience.

- * Every client will receive a personalized checklist showing all of 2018's tax documents/info to help prepare for 2019 tax returns (emailed or in the mail by Tuesday, January 14th). Intuit Link users can find them in 2019 documents.
- * **Updated pricing** to reflect the lowest of average rates across the country so we can continue to provide top notch & reliable service.
- * Client discounts are still available if you send us the majority of your documents and information by March 1st.
- * Tax prep payment will be due before taxes are sent for e-signing or paper signing.
- * **\$\$\$ No more additional charges** for tax planning, additional tax copies or documents.
- * **Engagement Letter** goes into effect when you send us your documents (attached).
- * If you've accepted our invitation to use Intuit Link, you now have access to the official copies of your tax returns that we have filed back to 2016 returns.

When you send us your documents and information, [we will respond within 24 hours \(excluding Sundays\)](#). PLEASE, if you don't hear back from us to confirm receipt, [PLEASE bug us!](#)

Many Blessings, Cressey Rice





What is this Intuit Link you keep referring to?

- Secure portal space
- You have your own login and password is simple to re-set.
- We ask questions and request documents from your personal checklist.
- You answer our questions and can ask your own questions as well.
- Smartphone compatible for uploading images.
- Your access is always available, and it does not expire.
- If you haven't received an invitation, just call or email us to initiate.

My Tax Return Start to Finish:

1. Prepare documents and information to send:
 - a. Client Checklist based on 2018 taxes
 - b. General Client checklists available: <http://cresseyrice.com/tax-checklists/>
2. Send documents and information securely:
 - a. Intuit Link (you login)
 - b. Safe Send portal drop box (no login)
 - c. Fax or Mail
3. Receive confirmation CRTS received and estimated date we will be in touch with questions.
4. Questions/Answers until return is ready
5. Receive a review copy
6. Cressey calls to finalize the return, plan ahead, and accept tax prep payment (no additional charge for cc)
7. Receive taxes for electronic signing/sign in person
8. Receive receipt of electronic filing along with directions for checking on refund status/making payments.

Anytime: Call or email with questions along the way!!

CRESSEY RICE TAX SERVICE

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Safe Send: <https://portal.safesend.com/54461352/DropOff.aspx>