

Paul S. Marciano, CPA, LLC.

Accounting and Tax Services

Office: 978-969-1451 | Cell: 508-932-5069 | Fax: 978-998-4940

100 Cummings Center, Suite 207-F
Beverly, MA 01915

paulmarcianocpa.com

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TO ALL EXISTING AND NEW CLIENTS:

COVID-19 COMMUNICATIONS PROTOCOL **ZOOM, FACETIME, PHONE, MAIL, EMAIL & FAX** **LIMITED IN-PERSON OFFICE MEETINGS**

The 2020 Holiday Season has passed and it is time to start thinking about having your 2020 Federal and state tax returns prepared. Unfortunately, the Covid-19 Pandemic remains and continues to impact our lives and the manner in which we conduct business. In order to conduct our business in a manner that puts the safety of our staff and clients first, **we have developed and will conduct our business in accordance with the Covid-19 Communications Protocol outlined below.**

1. Prior to February 1, 2021 our office will mail you the following information: (i) our 2020 Client Engagement Letter. (ii) a customized client specific 2020 Tax Organizer and (iii) a return envelope.
2. Upon receipt, **(i) sign and date the Engagement Letter, (ii) enter all the necessary information on the Tax Organizer and initial each page of the Tax Organizer, and (iii) gather up all of your necessary tax related source documentation** (e.g., W-2's, Form 1099's, applicable health insurance coverage forms, documentation of expenses, etc.).
3. **Return the Engagement Letter, Tax Organizer and your source documentation to our office in one of the following four (4) methods:**
 - (i) Place the material in the envelope provided and slide it in the mail slot in our office door at 100 Cummings Center, Suite 207-F, Beverly, MA 01915 (the same office as last year); **OR**
 - (ii) Mail the material to us addressed to Paul Marciano, CPA, 100 Cummings Center, Suite 207-F, Beverly, MA 01915; **OR**

- (iii) Fax the material to us at 978-998-4940; **OR**
 - (iv) Email the material to us at **paul@paulmarcianocpa.com**. ***If emailing, please do not email any documents with your social security number unless encrypted and password protected.***
- 4. Upon our receipt of your signed Engagement Letter, Tax Organizer and supporting documentation we will commence working on your return. If we have questions, we will try to contact you by email or phone to answer our questions.
 - 5. Once we have completed your return, we will forward the return to you along with instructions and the necessary forms we will need you to sign prior to our filing your return.

General Guidance

- 1. As always, the sooner you provide us with all the necessary forms and information, the sooner we can prepare and file your returns. If you do not provide us with all the information we require by March 15, 2021, we cannot guarantee that your return will be completed by the April 15th filing deadline, meaning that we may have to file for an extension.
- 2. Due to the Covid-19 Pandemic our staff will be working primarily remotely meaning that our office will not have regular business hours and may be “closed” at various times during the normal work day. You can drop material off at our office at any time by sliding an envelop through the mail slot in our door. The material will be picked up by a staff member at least once or twice daily.
- 3. If you have questions and need to speak to a member of our staff, please call the office (978-969-1451) to schedule a phone conference or a Zoom computer conference with one of our staff members. If no one answers the phone, please leave a message as we will check for messages daily. When leaving a message, please indicate how to best reach you between 1-2 p.m. or 6-7 p.m.
- 4. **Due to the COVID-19 Pandemic, in-person office visits will actively be discouraged and will only be permitted on an extremely limited, pre-approved basis.**

I look forward to assisting you in preparing your 2020 Federal and state tax returns. And I believe this Communication Protocol will enable us to continue to provide you with quality professional services while maintaining the safety of our staff and client.

Thank you.

Paul Marciano, CPA