

CLIENT INFORMATION UPDATE

[1] The only mailing address for me is P.O. Box 1990, Keystone Heights FL 32656. I do not have a Gainesville mailing address. I do not have my own Gainesville office. I use a client's office when it is not being used. The hours when I expect to be at this office are posted on this web site.

[2] Completed returns are being e-filed to the tax software company. They will e-file the returns to the IRS on February, Friday 12th. This just might work!!!

[3] Check the tax documents that you are submitting with the Client Checklist mailed to you in December.

[4] Please notify me of any tax information on the Client Checklist that should be deleted.

[5] This "web page" was designed before there were real web pages.

[6] The amount of each of your two stimulus payments are required to e-file your tax return. It could, repeat could, result in an additional refund. One example is when your Adjusted Gross Income (AGI) tanks in 2020.

[7] The clients that should be looking at this web page are not and the clients that know this information are looking at this web page!!! Just an observation!

[8] CARES Act, Section 2202, Retirement Plan Distributions. Form 8915-E is not on the IRS web site as of 2/6/21 at 11:14 ET. Error message in professional tax software: "You are unable to file at this time because we have not had time to update the program for recent tax legislation that Congress has passed for 2020 Qualified disaster or Corona-related distributions. This may be to the taxpayer's benefit".