

**Rom Gilbert, CPA  
PO Box 1990  
Keystone Heights FL 32656  
January 1, 2021**

«Title» «LastName»  
«Address1»  
«Address2»  
«City», «State» «PostalCode»

Dear «FirstName»:

As stated in my June 12, 2020 letter, the tax office is closed. You can call me at either 352-336-7799 or 352-473-3332. My email address is [romcpa@gmail.com](mailto:romcpa@gmail.com). PLEASE NOTE: If you are attaching large files, use [romcpa12@gmail.com](mailto:romcpa12@gmail.com). I will continue to pick up tax information at assisted living facilities as well as at the homes of elderly clients. Also, see [7] below. My mailing address is listed above. I may have a second mailing address during the tax season.

[1] The IRS does not call, text or email taxpayers. The same goes for Social Security. Do not provide any unknown individual with your personal information. If you don't know the person, do not respond. One recent scam involves federal stimulus payments. Do not bite!

[2] If you receive a letter from the IRS, get a copy to me as soon as possible. The IRS will be likely to win if you didn't report income from a W-2, 1099-R, 1099-MISC or other form but let's review the letter before making a payment. The IRS facts may be incorrect.

[3] Filing your return early is one way to protect against identity theft. If you receive a PIN from the IRS based on a prior year filing, please provide it. It is required to e-file.

[4] Please let me know of any changes such as address, telephone number, dependents (child tax credits), direct deposit account numbers, email address, etc. I still cannot read minds!

[5] Your client checklist is enclosed. Please review and make necessary additions, deletions and/or corrections. Apologies for the size of the print on the right side of the page.

[6] When you have to leave a message (keep it short), state your name and phone number twice. Every effort will be made to have up-to-date phone messages.

[7] For those who want to talk to me live and in color, I am in the process of making arrangements to use an office for a couple of hours for three days at the end of January and also for three days at the end of February. A notice will be included in this mailing if arrangements have been completed. If not, call or email in January to check to see if arrangements have been made.

An information page involving 2020 tax changes and tax items to submit is on back of this letter. The tax deadline for individual income tax returns is April 15, 2021.

Sincerely,

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