Helpful Hints for the 2009 Tax Return Season:

The Client Center:

1. Phase Two should go live any day. If you haven't opened an account, you may do so at www.skcpas.com. Please log-in and update your client information on the Client Info tab with any address, telephone and email changes. Doing so will generate an email from the site to our office with your changes. If you would like to change your log-in email address, please make a note on the Client Info tab and we will contact you.

2. Please add our addresses to your safe sender list, so messages from your CPA and the Client Center don't end up in your spam and junk folders.

3. You will now be able to contact your CPA directly through your online account, which increases the security of getting personal information to our office.

4. There will be fewer status-change emails from the Client Center and they will state whether any action from you is necessary to move forward with your project.

The Office:

5. There is an envelope drop slot (11.5 X 3 inches) marked "S&K, CPAs" to the right of our door for after-hour drop-offs. Please have everything in a sealed envelope with clearly marked "to" and "from" info.

6. Much as they would love to see you, during tax season it's very difficult to accommodate "drop-in" clients without scheduled appointments. During non-appointment time, your CPAs are returning calls, answering e-mails or working on returns. Thank you for your cooperation.

7. An e-mail rather than a phone call during tax season will generate a more thorough, thought out answer to your questions and concerns. It can also be answered at any time of the day or evening.

Tax Returns & Information Requests:

8. We are no longer able to provide your information directly to third party requestors, due to new IRS restrictions. We are only able to provide your information to you or upload it to your Client Center account for your distribution. Our administrative staff must have permission from your CPA to send any information to you. During tax season, your request may take longer than the 24 hour turnaround we usually try to provide.

9. The most common reason for federal and state letters generated after tax season regards estimated tax payments. Your reported payment amounts must match (to the penny) those received by the taxing authority. Please use the enclosed form to record payment dates and exact amounts to include with your tax docs for your CPA.

10. If you are receiving a refund and would like it direct-deposited, please provide a copy of a cancelled check (not a deposit slip).

11. March 1st through March 15th is dedicated to preparing corporate returns. If you have met with your CPA in the last 10 days or so of February, there is a good chance that the returns will be completed after the corporate deadline.

12. If you are checking the arrival of a fax or package, please call Leslie or Pat at 703-802-2309. If you are an online client, you may see the progress of your return by visiting your account and checking the project status. If you do not use the Client Center, please call Leslie or Pat for an update.