

November 16, 2020

Tax Season 2021

I hope this message finds you well, and relatively unscathed in what has proven to be a very challenging and trying year. As I look to the coming year, my hope for you all is, that the truly meaningful things in your life remain alive and continue to flourish. And that your focus remains on the blessings of interpersonal relationships, and the ties that bind us.

As we approach the upcoming tax-season I have had to examine repeatedly what exactly a tax-season will look and function like given the current resurgence of Covid-19. I believe that the hope of it being remedied in the very near future are fading, and the impending tax deadline of April 15th will come to pass before a substantive resolution to this virus is offered to us all.

If you have seen the 'Office Standards' frames hanging in each of the offices here, you know that they briefly describe my desires as to how my practice should function. What is expected of myself, my employees and my clients. The first line reads YOUR HEALTH AND YOUR FAMILY COME FIRST.

It is with this primary standard in mind, that I am announcing that we will not be having face to face appointments and we will be limiting the personal contact for this coming tax-season.

I have run through very many scenarios on how we could build procedures, that would enable us to continue to do as we have done for the last 25 years. However, given the limited and finite amount of time we have to do the amount of work, I believe it nearly impossible to do so, if the safety of you the client and my staff are to be the primary concern.

For many of you, this change will not affect the way we have been conducting business together. Over 45% of our clients do not schedule an appointment and each year simply upload, mail or drop off their work to our offices. When the returns are complete, they then pick up or have us mail the completed package to them. And each year that percentage continues to increase, with positive feedback regarding our efficiency and ease of use. And we have implemented a number of new procedures to further enhance the process. (See below)

For those of you, accustomed to having an appointment, I am sorry for the inconvenience and hope that you will understand my decision to proceed in this manner.

For all clients, know that we will have hours reserved if desired for phone and Zoom calls prior to the preparation of your taxes, or after they are complete to discuss the results. Know that we are always available by phone and email, not only during the busy months of tax-season but all throughout the year, for any questions and concerns you may have. And my staff and I will make ourselves available as best we can in whatever way we can.

Listed below are a number of the changes and enhancements that we are offering this year to help make this transition as seamless and efficient as possible for you. Along with various methods for getting your work to us, and us getting your completed work back to you. These may be enhanced or altered as we proceed throughout the season, all in hopes of providing you the best possible experience.

DROP BOXES

We will provide secure drop boxes at both our South Philadelphia and Washington Township offices. Simply drop the materials in the box. Please include any and all information you feel pertinent to entire process, including your preferred method of contact, and if you would like a call or online meeting scheduled. Our website includes a handy information sheet you can use to provide us with this information. The box at the South Philadelphia office will be located on the landing on the steps inside the lobby. The lobby door will normally be open from 8am to 8pm Mon to Friday and 8am to 5pm on Saturday. The box in the Washington Township will be located outside of the lobby and will be available around the clock.

US POSTAL OR OTHER COURIER SERVICE

We ask that all information sent to us via mail and courier be sent to the Philadelphia office at 1546 Packer Avenue 2nd Floor Philadelphia, PA 19145. Use this address regardless of where you normally schedule your appointment. Please include any and all information you feel pertinent to entire process, including your preferred method of contact, and if you would like a call or online meeting scheduled. Our website includes a handy information sheet you can use to provide us with this information.

For all materials being dropped or mailed to please include our [info sheet](#).

EMAIL AND SECURE LINK PORTAL

Many of our clients last year chose to use our secure portal to upload their information to us, and it was met with great success and solid performance.

The link for the portal can be found on our website www.mcnallyaccounting.com and any emails can be sent to info@mcnallyaccounting.com. For your safety and security, we ask that you not send us sensitive information as a simple email attachment, as it could be compromised in that form. We would also ask that information not be sent to us as a picture or in a picture format, as it can be very difficult for us to view, print and save documents in this format.

COMPLETED RETURNS

Once your returns are complete you will be contacted via your preferred method of contact, regarding getting your package to you and the next steps. That delivery method could be US Postal or any other courier. Also, new this year, will be given the opportunity to have your entire package sent to you electronically. You will also be able to then electronically sign the E File authorizations and return them to us electronically as well. Instantaneous, and no trips to the post office or postage fees!