January 21, 2021

Hello Everyone,

What a year! It seems like last tax season just ended and now it’s time for a new one. Things will look a little different this year for your tax preparation as we adapt to the Pandemic protocols set forth by the authorities.

In an effort to keep you and our staff safe, we will be following these procedures for tax season:

* We are urging clients to utilize Zoom or telephone appointments instead of in-person appointments
* Requiring all tax documents to be dropped off or sent electronically ahead of scheduled appointment
* ONLY the taxpayers will be allowed to enter the building and MUST wear masks at all times
* Clients will call when they arrive and will be let into the office when the preparer is ready for them
* Staff will be disinfecting between clients and hand sanitizer will be available

Things to be aware of:

* **ALL unemployment benefits (including pandemic benefits) are FULLY taxable both Federal and Mass! Please be sure to include your 1099-G if you received benefits in 2020**
* **We MUST know the amounts your received (or didn’t) for both the Stimulus payments. You do NOT need to repay this but you may be eligible for an additional amount if you did not receive the full payment already**
* **Any business that received a PPP loan or an EIDL from SBA needs to let us know the amounts you received. PPP loans are NOT taxable federally but may be taxable for Mass. EIDLs are taxable both federally and state.**
* **We offer a secure portal for uploading documents electronically. Please call Rachel at extension 105 or** **rmcnaughtan@lamotheassoc.com** **to set up access to the portal. Please do not email personal information.**
* **IRS is not accepting e-files until February 12, 2021** - **refunds with any type of child credits will not be released until some time in early March.**
* **April 15, 2021** – last day to file Federal and Mass returns (as of this date, but subject to change)
* **Call Brandy or Becki at extension 109 to book your appointment**. **All** appointments will be booked by the front desk.
* **Information can be dropped off at any of our four locations (Please call before dropping off in the Belchertown office) or mail to PO Box 669, East Brookfield, MA 01515 (for all locations).**
* IRS has increased the requirements for Head of Household and other credits related to children. We are now required to prove that each child you claim lives with you. Please include a document (report cards, medical forms, daycare statements, etc.) that shows each child’s address is the same as yours.
* Mass residents are still required to have minimum essential health insurance coverage or pay a penalty. Mass residents **MUST** have a Form 1099-HC and anyone who purchased insurance through the Connector **MUST** have a form 1095-A to complete the taxes.
* To help prevent identity theft, a copy of each spouse’s license is required for e-filing.
* Payment in full for your tax preparation invoice is required before we can e-file your return.
* We will do our best under the time constraints, but please know that you may have to file an extension if we do not have your complete information by April 9, 2021.
* Please check our website www.lamotheassoc.com for valuable information.

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