

## **SQUIRE TAX RETURN PREPARATION PROCEDURES UNDER COVID-19 CONDITIONS**

As a member of our valued Squire family, we are dedicated to serving your tax and accounting needs. Even in the current environment, we are still available to work and complete your tax returns to meet filing deadlines. Our team is available through remote work arrangements to serve you. We are temporarily updating our office procedures for Tax Returns under the COVID-19 alert to encourage the use of our online tools for the health and safety of our entire Squire family. These procedures are as follows:

### **1. Appointments with your CPA**

- We are asking that all appointments take place either by telephone or video chat.
- We understand that in some circumstances, it may be necessary to meet in person. A limited number of appointments are available as we work within guidelines from state and local governments.

### **2. Delivering documents for tax return preparation**

- We encourage sending your documents to us through secure electronic document exchange options. We use a [private client portal](#) and a secure email exchange. Please contact your tax preparer or administrative staff to help you access one of these options.
- We also encourage the use of mail, FedEx, UPS, etc. to deliver your documents to us.
- We understand that in some circumstances it is necessary to drop off your documents at our office. Our office will be open with limited staff to accept your documents between our normal business hours of 8:00 AM – 5:00 PM.

### **3. Completion of tax returns**

- Our preferred method of sending your completed tax returns to you is through a [private client portal](#) for you to access and review. The instructions for filing and required signature pages are included for how to finish sending your tax return. Our administrative team can set up this portal for you.
- We can also send you electronic copies of completed tax returns through our secure document exchange email service. Instructions for filing and required signatures will also be sent to help you complete your tax filings.
- Additionally, we can send completed tax returns to you through US Mail.
- In instances where tax returns need to be signed and mailed to the IRS or electronic delivery options are not viable, our office will remain open with a limited staff to help complete the process of filing your returns.

### **4. Signatures for tax returns**

- When possible, we prefer to provide you with the opportunity to sign tax return authorization forms electronically.
- You can return your signed filing authorization forms through email by scanning the document, taking a picture of it, or putting it in the mail.
- You can also drop off the signed filing authorization forms to our office during regular business hours if needed.