

SQUIRE TAX RETURN PREPARATION PROCEDURES UNDER COVID-19 CONDITIONS

As a member of our valued Squire client family, we are dedicated to serving your tax and accounting needs. We are committed to "Stay Safe to Stay Open" with our team working to support you in your tax and accounting deadlines and needs. We are using several virtual options to connect with you and can make specific arrangements based on needs and circumstances. We have temporarily updated our office procedures for Tax Returns under COVID-19 conditions and encourage the use of our online and virtual tools for the health and safety of our entire Squire family. These procedures are as follows:

1. Appointments with your CPA

- We prefer 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 state and local government guidelines.

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 offices have secure drop boxes available that are checked daily.

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 be available schedule an appointment following appropriate protocols to help complete the process of filing your returns.

4. Signatures for tax returns

- We prefer to provide you with the opportunity to sign tax return authorization forms electronically as our standard practice.
- 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.