



George S Magas CPA PC
Phone 301.253.0013 Fax 240.465.0201

January 18, 2021

Dear Client,

We hope that you are all staying healthy and keeping faith that 2021 will bring brighter days for all.

We are celebrating our 31st year in business and can't thank you enough for your continued confidence and support. The 2020 tax year will bring many new challenges and some changes we have never faced before. Please have extra patience should we take a little longer in preparing your return.

To assist in making us more efficient, please take note of the following:

- Visit our website for answers to many questions www.magascpa.com
- Email Cathy (cathy@magascpa.com) to schedule appointments, to get answers not available on the website, and any billing questions.
- Consult George prior to any decisions regarding Social Security, retirement income planning, incorporating, rolling over retirement funds and investments.
- Email Kyle (kyle@magascpa.com) with tax and/or payroll questions, and with additional tax information to be added.
- Email Kevin (keving@magascpa.com) with any tax questions and to request an organizer.
- Consider uploading your information to our secure portal. Instructions can be found on our website listed above. (Please call Kevin if you have any questions)
- Having any tax documents given to us out of envelopes and organized in order of the organizer.
- Double checking that you have provided us with all info needed.
- Waiting for us to contact you with questions or notice of completion.

As of today, the filing deadline is **April 15, 2021**. We will need all info to us by March 26, 2021 to prepare on time and as a designated "paid preparer", I must be paid before I can electronically file.

We are requesting that those of you who usually prefer a face to face appt, **schedule a telephone or virtual meeting this year**. We would need your information sent in at least one week prior and there will be a meeting charge of \$50. We can't guarantee an in person meeting but if you strongly feel you need one, the additional charge is \$75.

Websites: magascpa.com or gmagas.retiresmarter.com



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Outside of appointment fees, our fees will be based on:

- Organization
- Number of Forms
- Complexity
- Extra time spent on collecting additional information

Extensions are completed by written request only and once payment of \$60.00 is received. PDF copies of past tax returns have a charge of \$25.00. As a reminder, all previous tax returns are uploaded on clients Smart Vault portals.

We remind you that tax planning should be addressed throughout the year as an integral part of retirement planning. As always, we encourage you to contact us to discuss how these issues impact your tax position, as well as your retirement.

We look forward to working with you again this year and wish you a happy, healthy, and prosperous 2021!

Sincerely,

A handwritten signature in black ink that reads 'George S. Magas'.

George S Magas CPA

Here to help you in 2021..... George, Cathy, Kyle, Kevin , Adriana, Isabella , Nick and Eric

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