

SARTELL TAX & ACCOUNTING SERVICES INC

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SARTELL, MN 56377

December 29, 2020

Welcome to Sartell Tax & Accounting Services Inc. We would like introduce ourselves first is Diane. Diane has a bachelor's of accounting from the University of Minnesota. She is an active Certified Public Accountant(CPA) with the state of Minnesota and has 13 years of experience in income tax preparation services. She is also a member of the Minnesota Association of Public Accountants (MAPA). Diane lives in Sartell with her husband and 3 children. In her free time she enjoys crafting and spending time at the lake with her family. Next is Christie. Christie has a Masters Degree in Business Administration with an accounting emphasis from the Minnesota School of Business. Christie has 12 years of experience with income taxes as well as 10+ years in payroll and general accounting practices. Christie is a Certified ProAdvisor for both desktop and online Quickbooks software. Christie is studying to take the CPA exam. Christie lives in Saint Augusta with her husband and 5 children. Christie is involved in her children's travel soccer league and enjoys spending time playing with her children.

WOW, what a year! Hopefully you all are doing well. Last tax season was busy and a challenge to finish but we survived. We are looking forward to working with you this year. It is going to be another fun and challenging year. Who knows what COVID-19 will bring. We are planning for the worst hoping for the best. We have been to many tax training seminars in the past couple of months to help prepare for your returns. We have purchased the latest tax software which has all the updated laws. Please read to the end, included we have important changes for your appointments.

Completion options (all **must fill out** attached sheets): **exceptions apply, subject to client needs*

1. Hybrid Appointment* (recommended) – get your info to us we call you to schedule a 10-minute appointment to go over your info in person or zoom. It must be in by **April 8th**
2. Regular Drop off* – get your info to us, we call you when it is done, it takes at least a week depending on volume and day dropped off. It must be in by **April 8th** - possible \$10 discount
3. Zoom meeting* – get your info to us and we will schedule the zoom
4. Business/farm appt* – call to schedule (get us info ahead of appt) zoom preferred.

Once you have all your paperwork together (with forms filled out, initialed, signed, **out of envelopes, unfolded, and on a neat no staples pile**) you can drop off no need to call. Drop off options: (1) In the slot that drops into the building on the right corner of the building (**see signs**) (2) Secure File Pro (must call to get set up) (3) Mail to the PO Box (4) Fax (5) Email (not recommended). When your return is finished, our office manager will call to set up a review and pick up appointment. This appointment will be 10 to 14 minutes (we are keeping contact under 15 minutes if possible) with your preparer. If you do not want/need a review appointment, let us know and we will prepare your return for pickup. Either way call when you arrive and we will let you know when you can enter the building.

We will begin processing January 25th. The office will have regular hours starting February 1st. The office hours will be Mon-Fri 8:00am-6:00pm and Sat 9:00am-3pm, or by special arrangement. If there are questions for/from Diane and Christie or you are missing information, due to how busy they are, we will be scheduling a time for call back. Most questions will be answered by the office manager Alana, if there are remaining questions, we will schedule a phone appt.

We are requiring you to fill out the attached information and bring all original documents please. If we are missing something you will need to get it to us in order to complete your tax return and will incur an additional charge. Our website **www.sartelltaxservice.com** has more information. Also, if you have any questions please give us a call at **320-656-9021**. We look forward to serving you.

Sincerely,

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